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Hosiery/Legwear (Men's, Women's and Children's)

FAIRCHILD FACT FILE

Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst
Kenneth Greenman, Research Analyst

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HOSIERY/LEGWEAR
(Men's, Women's and Children's)

Market Trends

The hosiery business continues to register gains, continuing the revival which started in 1983. However, the proliferation of fashion elements in hosiery, the wide diversity of products offered as a result of technical developments in yarns and blend levels, and in finishing processes, have stepped up the competition. Over-production continues to be a growing problem, aggravated by the development of high speed, high-tech manufacturing equipment, plus expansion of imports. This is leading to consolidations within the industry.

Frequent changes in lines have become necessary to maintain that competitive edge and fashion excitement. Fast changes in fashion, particularly for women, but in hosiery for men, boys and girls, too has stepped up competition at the retail level. Department and specialty stores generally have held on to their niche in upscale fashion hosiery, but to an increasing extent these stores are meeting head-on competition from large discounters. A survey by American Enka indicated that more than one in four women buys her sheer hosiery at discounters and these stores are expanding their brand and style selections. The pressure is on department and specialty stores to meet this competition with a wider assortment in terms of hosiery types, fashion features and colors, as well as sizes.

Another tactic in the competitive battle has been the development of designer labels and also of private labels by department stores and upscale specialty stores. Women, in general, tend to be loyal to hosiery brands and it is hoped to build a strong following for the store label. Some large discounters, too, have developed private brands in women's hosiery.

In the casual hosiery area, women and girls have been turning away from knee-highs and are registering a preference for anklets. Sport socks, too, have maintained strength. In men's hosiery, tube socks, especially those sold in multipacks, have registered sales gains. The biggest fashion element in men's casual hosiery has been toward argyles, rugby stripes, and colors; and this has carried over to boys' hosiery.

With a continued interest in fitness and leisure wear, sales of dancewear, tights and leotards have been maintained at good levels, particularly in department stores. Most of these stores sell these items in their hosiery departments; although some stores have separate exercisewear departments. Sales of women's leotards have been reported close to $300 million in annual volume.

AT THE MANUFACTURER LEVEL

A complete census of all manufacturers in the U.S. is compiled every five years by the U.S. Department of Commerce, Census Bureau. Findings on the most recent census, covering 1982, were recently released, as well as results of the 1983 annual survey of manufactures. An annual survey is undertaken each year in the intercensal period to provide estimates on key measurements of manufacturing activity.

The number of mills operating in hosiery industry classifications in 1983 (593) registered a decline of 5.3% compared with 1982 (626). Industry shipments and miscellaneous receipts, however, rose 11.5%, to reach $3.2 billion, while value added within the industry's manufacturing process (not including raw materials, supplies, etc.) rose over 20%.

GENERAL INDUSTRY STATISTICS

Hosiery, Total (SIC 2251 & SIC 2252*)
(Dollar figures are in current dollars)

	1983	1982	1977	% Change	
				1983/1982	1982/1977
Number of companies	na	na	528**	—	—
Number of mills	593	626	615	- 5.3%	+ 1.8%
Number with 20 or more employees	393	381	376	- 3.1	+ 1.3
Employees, total (thous.)	64.4	62.8	58.8	+ 2.5	+ 6.8
Production workers (thous.)	57.9	55.5	52.8	+ 4.3	+ 5.1
Payroll (mil. $)	$ 729.0	$ 637.6	$ 410.0	+ 14.3	+ 55.5
Value added by manufacture# (mil. $)	1,674.6	1,394.7	858.5	+ 20.1	+ 62.4
Value of industry shipments## (mil. $)	3,183.4	2,854.7	1,792.5	+ 11.5	+ 59.2
Capital expenditures, new (mil. $)	52.7	57.4	31.4	- 8.2	+ 82.8

Women's Hosiery, Including Tights (Except Socks) (SIC 2251*)

	1983	1982	1977	% Change	
				1983/1982	1982/1977
Number of companies	na	180	176	—	+ 1.7%
Number of mills	182	206	200	- 11.7%	+ 3.0
Number with 20 or more employees	125	118	119	+ 5.9	- 0.8
Employees, total (thous.)	30.8	30.2	26.6	+ 2.0	+ 13.5
Production workers (thous.)	27.5	26.7	23.8	+ 3.0	+ 12.2
Payroll (mil. $)	$ 354.5	$ 311.1	$ 191.3	+ 14.0	+ 62.6
Value added by manufacture# (mil. $)	903.0	777.4	457.0	+ 16.2	+ 70.1
Value of industry shipments## (mil. $)	1,566.9	1,411.3	871.2	+ 11.0	+ 62.0
Capital expenditures, new (mil. $)	26.7	26.0	16.6	+ 0.8	+ 56.6

Hosiery, n.e.c (SIC 2252*)

	1983	1982	1977	% Change	
				1983/1982	1982/1977
Number of companies	na	376	382	—	- 1.6%
Number of mills	411	420	415	- 2.1%	+ 1.2
Number with 20 or more employees	268	263	257	+ 1.9	+ 2.3
Employees, total (thous.)	33.6	32.6	32.2	+ 3.1	+ 1.2
Production workers (thous.)	30.4	28.8	29.0	+ 5.6	+ 0.7
Payroll (mil. $)	$ 374.5	$ 326.5	$ 218.7	+ 14.7	+ 49.3
Value added by manufacture# (mil. $)	771.6	617.3	401.5	+ 25.0	+ 53.7
Value of industry shipments## (mil. $)	1,616.5	1,443.4	921.3	+ 12.0	+ 56.7
Capital expenditures, new (mil. $)	26.5	31.4	14.8	- 15.6	+112.2

na not available
n.e.c. not elsewhere classified

(footnotes continued)

(footnotes from previous table continued)

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC) determined by the principal product made. The hosiery classifications comprise all mills primarily engaged in knitting, dyeing or finishing hosiery. SIC 2251 covers mills making women's full-length and knee-length seamless and full-fashioned hosiery, pantyhose and tights.

SIC 2252 covers mills engaged in knitting, dyeing or finishing infants' and children's hosiery, men's and boys' hosiery, socks, slipper socks and all other types of hosiery not included in SIC 2251.

** Represents the 1977 enterprise industry category (22B). (See 1977 Enterprise Statistics, U.S. Bureau of the Census ES 77-1). This information is not yet available for 1982. (Note: 4 digit SIC counts on companies are not additive as some companies are in both industry classifications).

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by other manufacturers, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes receipts for contract work and miscellaneous receipts as well as the value of shipments of both primary products and secondary products made by manufacturers in these industries. The value of primary product shipments (hosiery), alone--plus the value of shipments of hosiery by mills classified in other industries who make hosiery as secondary products--is covered in this section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures; 1983 Annual Survey of Manufactures (Data on number of mills in 1983, are from County Business Patterns).

On a current basis, the National Association of Hosiery Manufacturers (NAHM) Charlotte, N.C., compiles statistical information on the hosiery industry based on reports received regularly from knitting mills producing a majority of all the types of hosiery made in the United States. These reports reflect the trends which are the important guides to the hosiery industry and its market.

Added to the amounts actually reported are estimates representing the balance of the industry's activity, to arrive at industry-wide data. The NAHM figures do not include non-knitting companies, such as commercial dyers and finishers, converters, etc.

Under the classification system used by the NAHM, there was a total of 297 companies producing hosiery, (as described) in 1985. This was the largest number reported since 1981 (302), but compared with a count of 357 companies reported 10 years ago (1975). A total of 411 individual hosiery plants or mills was reported for 1985. This compares with 474 plants counted in 1975.

GENERAL INDUSTRY STATISTICS

Number of Hosiery Companies, 1982-1985
(As of end of year)

		Women's			All Other**		
Year	Total	Total	North***	South	Total	North***	South
1985	297	87	19	68	215	17	198
1984	283	89	21	68	198	13	185
1983	292	92	22	70	207	13	194
1982	295	92	22	70	210	13	197

Number of Hosiery Mills (Plants), 1982-1985
(As of end of year)

		Women's			All Other**		
Year	Total	Total	North***	South	Total	North***	South
1985	411	146	23	123	267	21	246
1984	413	149	25	124	266	21	245
1983	415	146	25	121	269	22	247
1982	417	146	25	121	271	22	249

* Covers hosiery, pantyhose, socks, etc., knit on 300 needles or more for women and girls, size 7 and up. (Some companies are included in both data designated * and **).

** Covers hosiery knit on less than 300 needles for infants and children (size 3-8 1/2), for girls, boys and women (size 8-11); for men (size 10 and up).

***North includes the Midwest and Far West.

Source: National Association of Hosiery Manufacturers, 1985 Hosiery Statistics.

Employment & Earnings

Employment levels are holding up better in women's hosiery mills than noted in reports on other mills. As of February 1986, total employment in women's hosiery mills averaged 33,300. This compares with 32,100 in February 1985. However, it is well below the peak monthly average of 35,500 reported in 1974.

In other types of hosiery mills, mainly men's, average employment in February 1986 stood at 33,000, compared with 33,200 in the same month a year earlier. The peak for these mills was in 1977, when employment averaged 34,500.

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Employment & Earnings in the Hosiery Industry, 1983-1985
(Annual Averages)

	Women's Hosiery, Except Socks (SIC 2251*)			Hosiery, n.e.c (SIC 2252*)		
	1985	1984	1983	1985	1984	1983
All employees (thous.)	32.9	33.3	32.9	33.2	34.7	34.5
Production workers (thous.)	29.4	29.9	29.5	29.6	31.2	31.2
Av. weekly earnings	$235.52	$218.68	$220.40	$213.23	$209.44	$207.04
Av. weekly hours	38.8	37.9	40.0	36.7	37.4	38.2

n.e.c. not elsewhere classified

* See page 3 for definition of the Standard Industrial Classification (SIC) codes.

Source: U.S. Bureau of Labor Statistics

INDUSTRY CONCENTRATION

When the 1977 census of manufactures was compiled by the Census Bureau, it was found that the four largest companies classified in the women's hosiery industry (SIC 2251) accounted for 50% of the total value of industry shipments -- up from 35% in 1972. The 20 largest companies had a 73% share; the 50 largest, 94%. In the "other hosiery" industry classification (SIC 2252), the four largest had a 20% share of industry shipments in 1977; the 20 largest, 46%; the 50 largest, 66%.

Comparable figures for 1982, based on the latest census, have not yet been released by the Bureau. However, some data on concentration can be found in information on single vs. multiunit operations, as well as on employment size of mills.

Of the 180 companies classified in the women's hosiery (except socks) industry (SIC 2251) in 1982, 28 (15.5%) were multiunit companies, operating 54 plants (26% of the total 206 plants in the industry). These 44 companies accounted for 75% of the industry's total employment, 85% of the value added by manufacture within the industry, and almost 83% of the total value of industry shipments. (1982 Census of Manufactures: Type of Organization (MC82-S-5).

INDUSTRY CONCENTRATION

Of the 376 companies classified in the hosiery not-elsewhere-classified industry (SIC 2252), 44 (11.7%) were multiunit companies. These companies operated 88 out of the total 420 plants (21%), had 50.3% of the industry's total employees, accounted for 56% of the total value added by manufacture within the industry, and accounted for almost 56% of the industry's total value of shipments.

Figures on mill employment size from the 1982 census show that in the women's hosiery industry, there were 64 mills with 100 or more employees (31% of the total mills). These mills accounted for 59% of total industry employment, 93% of the total value added by manufacture, and 91% of the value of industry shipments.

Mills in the other hosiery industry classification which had 100 or more employees numbered 100 (23.8% of the total of 420). These big employers accounted for 74% of total industry employment, 78% of the value added by manufacture and 75% of industry shipments.

Hosiery Mills By Employment Size, 1982

	Establishments		Value added by Manufacture		Industry Shipments	
	Number	Percent	Mil.$	Percent	Mil.$	Percent
Women's hosiery, exc. socks, (SIC 2251), total	206	100.0%	$ 777.4	100.0%	$1,411.3	100.0%
By establishment size:						
Number of employees:						
Under 10	61	29.6	5.4	6.9	10.2	0.7
10 - 19	27	13.1	5.9	0.8	14.9	1.1
20 - 49	26	12.6	12.2	1.6	24.9	1.8
50 - 99	27	13.1	29.1	3.7	74.4	5.3
100 - 249	29	14.1	78.2	10.1	205.8	14.6
250 - 499	19	9.2	156.8	20.2	287.2	20.3
500 or more	17	8.3	486.4	62.6	793.9	56.2
Hosiery, n.e.c. (SIC 2252), total	420	100.0%	$ 617.3	100.0%	$1,443.4	100.0%
By establishment size:						
Number of employees:						
Under 10	98	23.3	6.3	1.0	15.9	1.1
10 - 19	59	14.0	11.8	1.9	30.7	2.1
20 - 49	110	26.2	55.7	9.0	161.4	11.2
50 - 99	53	12.6	60.6	9.8	153.2	10.6
100 - 249	67	16.0	202.9	32.9	468.0	32.4
250 - 499	27	6.4	197.6	32.0	447.5	31.0
500 or more	6	1.4	82.4	13.3	166.7	11.5

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982
MC82-I-22B

INDUSTRY CONCENTRATION

In the annual report County Business Patterns, the Census Bureau has reported comparable figures on employment size of mills and total employment for the year 1983.

Hosiery Mills by Employment Size, 1983

	Women's Hosiery (SIC 2251*)			Hosiery, n.e.c. (SIC 2252*)		
	No. of Mills	% of Mills	% of Employment	No. of Mills	% of Mills	% of Employment
Total establishments	182	100.0%	100.0%	411	100.0%	100.0%
Number by employment size:						
Under 10 employees	40	22.0	0.4	84	20.4	na
10 to 19 employees	27	14.8	1.2	59	14.4	2.5
20 to 49 employees	22	12.1	1.9	119	29.0	11.4
50 to 99 employees	32	17.6	7.0	57	13.9	12.5
100 to 249 employees	26	14.3	14.2	57	13.9	29.9
250 to 499 employees	16	8.8	19.3	28	6.8	na
500 employees or more	19	10.4	55.9	7	1.7	na

na not available
n.e.c. not elsewhere classified
* For definition of SIC codes, see page 3.

Source: U.S. Bureau of the Census,
County Business Patterns 1983

Capacity Utilization Rates

The U.S. Bureau of the Census conducts an annual survey of plant capacity which covers operations in the fourth quarter of the year. Measures on capacity utilization include a rate which is based on plant operators' preferred level of operations, i.e. generally considered to be the rate at which profits will be maximized.

Capacity Utilization Rates in the Hosiery Industry Fourth Quarters 1981-1984

	Preferred Rate			
	1984	1983	1982	1981
Women's hosiery, exc. socks	83	91	90	86
Hosiery, n.e.c.	83	90	83	82

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, Current Industrial Reports, Survey of Plant Capacity, 1984 (MQ-C1(84)1

LOCATION OF THE INDUSTRY

About nine out of 10 mills operating in the hosiery industry are located in the South, and this region accounted for 92.7% of total hosiery production in 1985, compared with 92.2% in 1983, according to the National Association of Hosiery Manufacturers.

North Carolina is the dominant State in the industry. The Association reports that in 1985 North Carolina accounted for well over half of total hosiery production (56.4%) and is particularly important in the output of sheer hosiery for women, accounting for almost 70% of total 1985 production in this classification -- a sharp rise from the States' 45% share in 1981, and 55% in 1982.

The U.S. Census Bureau has reported data on the two major segments of the hosiery industry by States, based on the complete 1982 census of all U.S. manufacturers. According to this source, North Carolina had 56% of the mills producing women's hosiery and these mills accounted for 58.5% of value added in the industry and 64.5% of industry shipments (dollar value) in 1982.

In "other hosiery" classifications, Tennessee accounted for the biggest share of value-added (12.9%) and had a 20% share of industry shipments.

Leading Manufacturing States In the Hosiery Industry, 1982

	Establishments		Value added	Industry
	Total	With 20+ Employees	By Manufacture (Mil. $)	Shipments (Mil.$)
Women's hosiery, exc. socks, total	206	118	$ 777.4	$1,411.3
Leading states:				
North Carolina	116	81	454.6	910.9
Pennsylvania	15	8	4.9	9.9
Leading states, total	131	89	459.5	920.8
Leading states, percent of total	63.6%	75.4%	59.1%	65.3%

(continued)

LOCATION OF THE INDUSTRY

Leading States In the Hosiery Industry, 1982
(continued)

	Establishments Total	Establishments With 20+ Employees	Value added By Manufacture (Mil. $)	Industry Shipments (Mil.$)
Hosiery, n.e.c., total	420	263	617.3	$1,443.4
Leading states:				
North Carolina	274	171	366.5	869.6
Alabama	41	24	33.8	91.4
Tennessee	32	25	79.4	174.5
Georgia	19	12	33.8	88.8
Leading states, total	366	232	513.5	1,224.3
Leading states, percent of total	87.1%	88.2%	83.2%	84.8%

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
Census of Manufactures, 1982 (MC82-1-22B)

NATIONAL ADVERTISING

An analysis of spending for space and time in major media by the hosiery industry shows a total of $88.8 million in 1984, up 36.3% over the total of $65.1 million reported for the year 1980.

Network television accounted for 65% of the 1984 total compared with 71% in 1980. The combined share of network and spot TV advertising in 1984 represented 75% of the 1984 total (down from 78% in 1980), and hosiery is the biggest TV advertiser in the apparel category. Over 20 brands were advertised on TV last year compared with just one, Hanes, a few years ago.

The biggest TV advertiser in 1984 was Consolidated Foods Corp. (including Hanes, L'eggs and Underall divisions). This advertiser spent $47.7 million on hosiery advertising in TV (time costs), 22% more than in 1983. The second biggest spender was Gulf & Western (including Burlington and No Nonsense divisions). This company spent $18.3 million for TV time advertising hosiery, up 22% compared with 1983.

Originally, TV commercials on hosiery concentrated on the packaged-goods approach suitable for the heavy distribution in drug stores, supermarkets and discount stores. The emphasis was on price and convenience, rather than fashion. New developments in fashion appeal, and technical improvements involving fit, comfort and wear, have changed this approach. TV hosiery advertising has become much more glamorous, as lines expand and competition between brands grows sharper.

NATIONAL ADVERTISING

Expenditures for Space/Time in Major Media By Hosiery Manufacturers
(Thousands of dollars)

	1984	1980	% Change 1984/1980
6-Media total	$88,783.0	$65,131.1	+ 36.3%
Consumer magazines	19,108.6	13,196.8	+ 44.8
Newspaper supplements	1,084.4	522.8	+107.4
Network television	57,975.5	46,440.0	+ 24.8
Spot television	8,836.3	4,170.8	+111.9
Network radio	1,773.7	767.7	+131.0
Outdoor	4.5	33.0	- 86.4

Source: Leading National Advertisers

PRODUCTION

The National Association of Hosiery Manufacturers, Inc., Charlotte, N.C., compiles hosiery industry information based on reports from manufacturers and estimates covering non-reporting hosiery producers.

Production of hosiery by U.S. mills reached a peak of 310.1 million dozen pairs in 1981, then as the recession got underway declined to 281.8 million dozen pairs in 1982. Production rebounded in 1983, reaching 309.4 million dozen pairs, but declined to 307.5 dozen pairs in 1984, then fell to 303.3 million dozen pairs in 1985.

Of total hosiery production, women's pantyhose represented 37.7% in 1985, and accounted for 71.3% of the total women's and girls' hosiery category, up from 70.3% in 1984. The chief type -- sheer pantyhose, which accounted for 51% of 1985 production of pantyhose -- registered a drop of almost 14% in output compared with 1984. Elastomer types, on the other hand, which held a 43% share of the 1985 pantyhose total, registered a gain of 24.3% in production compared with the 1984 total. Control-tops -- which at 21.9 million dozen pairs represented 44.6% of women's elastomer hosiery production -- gained 5.6% compared with 1984.

Production of men's hosiery (22.2% of the 1985 hosiery total) was down 1.4% compared with 1984, with anklet production down 3.7%; midcalf and crew socks down 0.4%; knee-highs, down 0.7%.

Production of Hosiery, 1982-1985
(Dozens of pairs in thousands)

	1985	1984	1983	1982	% Change 1985/84
Total hosiery & major types					
Hosiery, total	303,350	307,490	309,420	281,768	- 1.3%
Infants' & children's, sizes 3 - 8½	26,353	27,191	27,041	25,764	- 3.1
Footsocks	699	781	620	618	-10.5
Anklets	14,200	15,356	16,522	16,055	- 7.5
Mid-calf/crew	5,721	3,603	1,396	1,446	+58.8
Knee-highs	4,579	5,841	6,993	6,653	-21.6
Waist-highs	1,129	1,539	1,471	992	-26.6
Stockings	25	71	39	*	-64.8
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles) total	49,287	49,876	54,223	46,324	- 1.2
Footsocks	6,127	5,154	5,830	6,503	+18.9
Cushion	5,403	4,577	5,424	6,121	+18.0
Non-cushion	724	577	406	382	+25.5
Anklets	19,397	19,500	17,285	11,875	- 0.5
Cushion	7,967	8,821	7,178	4,321	- 9.6
Non-cushion	11,430	10,688	10,107	7,554	+ 6.9
Mid-calf/crew	6,238	4,516	4,858	3,984	+38.1
Cushion	4,141	2,752	3,732	2,982	+50.5
Non-cushion	2,097	1,764	1,126	1,002	+18.9
Knee-highs	17,006	20,175	25,654	23,403	-15.7
Cushion	7,549	8,094	9,966	6,958	- 6.7
Non-cushion	9,457	12,081	15,688	16,445	-21.7
Stockings	60	97	48	79	-38.1
Waist-highs (tights) size 7 & up	459	434	548	480	+ 5.8
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more) total	160,326	162,051	161,677	147,678	- 1.1
Pantyhose	114,267	113,882	116,650	105,076	- 0.3
Sheer	57,947	67,147	64,048	58,491	-13.7
Opaque	5,245	5,437	3,463	2,399	- 3.5
Elastomer	49,011	39,428*	47,622	43,226	+24.3
Other (tights, size 7 & up)	2,064	1,870	1,427	960	+10.4
Stockings	3,832	4,204	4,854	4,477	- 8.8
Non-stretch	1,216	1,276	1,514	1,463	- 4.7
Stretch	2,209	2,468	2,712	2,434	-10.5
Support	358	412	570	540	-13.1
Other	49	48	58	40	+ 2.1
Other women's hosiery	42,227	43,965	40,263	38,125	- 4.0
Footsocks	330	238	369	372	+38.7
Anklets	635	685	791	756	- 7.3
Knee-highs	41,220	42,952	39,067	39,979	- 4.0
Mid-calf/crew	42	90	36	--	- 53.3

* Believed to be under-reported.

(continued)

Production of Hosiery, 1982-1985
(Dozens of pairs in thousands)
(continued)

Total Hosiery & Major Types (continued)	1985	1984	1983	1982	% Change 1985/84
Men's hosiery (size 10 & up) (knit on less than 300 needles)					
total	67,384	68,372	66,479	66,002	- 1.4%
Cushion	35,101	35,284	33,359	31,562	- 0.5
Non-cushion	32,283	33,088	33,120	30,440	- 2.4
Footsocks	959	733	471	352	+30.8
Cushion	716	450	262	144	+59.1
Non-cushion	243	283	209	208	-14.1
Anklets	25,083	26,047	26,721	26,723	- 3.7
Cushion	4,461	4,748	5,008	5,882	- 6.0
Non-cushion	20,622	21,299	21,713	20,841	- 3.2
Mid-calf/crew	17,583	17,657	17,746	17,274	- 0.4
Cushion	9,775	9,954	10,232	11,132	- 1.8
Non-cushion	7,808	7,703	7,514	6,142	+ 1.4
Knee-highs	23,759	23,935	21,541	17,653	- 0.7
Cushion	20,149	20,132	17,857	14,404	+ 0.1
Non-cushion	3,610	3,803	3,684	3,249	- 5.1

Source: National Association of Hosiery Manufacturers, 1985 Hosiery Statistics.

CONSUMPTION OF FIBERS/MATERIALS

Man-mades account for the major share of fibers consumed in the hosiery industry, representing over 85% of total fiber consumption in 1984. There is a variation in the level, and in the type of man-made fiber consumed by hosiery type, however. In women's hosiery, most of which fall in the panty-hose category, nylon accounts for almost all of the fiber poundage consumed. In men's hosiery, acrylic fiber dominates, representing a total of some 62 million pounds used in men's socks, or about 70% of total fibers used. High bulk acrylic is used extensively in athletic socks. In April 1986, Monsanto announced the introduction of a new highbulk acrylic fiber for the men's sock market, Acrilan II HI-Bulk, which is said to offer improved dyeability and wear characteristics. Natural fibers (cotton and wool) have a niche in the athletic sock market, as well as accounting for about 30% of total fiber consumption in men's hosiery.

Fiber/yarn producers and hosiery mills have greatly stepped up efforts to work with retailers in providing fashion excitement in hosiery through innovations in fiber treatments, development of new blends and new yarn processing to provide a natural-fiber hand as well as through the development of new colors, patterns and ornamentations.

CONSUMPTION OF FIBERS/MATERIALS

Trade sources report a fast-growing premium pantyhose market as a result of the improved silky, sheer Lycra spandex fiber produced by DuPont, which has led major hosiery producers to launch new sheer lines. Nylon and Lycra spandex sheer pantyhose account for nearly 10% of all retail panytyhose sales nationally. That figure is expected to triple by 1988, according to DuPont.

Textile Fibers Consumed in U.S. Production of Hosiery, 1982-1984
(Millions of pounds)

	1984	1983	1982	% Change 1984/1983
Sheer hosiery, total reported*	86.0	80.7	71.6	+ 6.6%
Man-made, total	82.6	77.2	68.5	+ 7.0
Cotton	3.4	3.5	3.1	- 2.9
Anklets & socks, total**	180.1	195.2	172.9	- 7.7
Man-made, total	131.5	152.6	139.8	-13.8
Cotton	45.2	39.6	30.6	+14.1
Wool	3.4	3.0	2.5	+13.3

* Includes pantyhose, stockings, body stockings, leotards & tights, sheer knee-highs and anklets and support hose.

**Includes footsocks, anklets, half hose, over-the-calf hosiery and non-sheer knee-highs, for all ages and both sexes. Also includes infants' and children's waist highs.

Source: Textile Economics Bureau,
Textile Organon (September 1985)

Information on the value of materials, containers and supplies consumed in the hosiery industry, and to a limited extent quantities consumed, is published by the Census Bureau in the complete census of manufactures conducted every five years. The most recent covers the year 1982.

Materials Consumed, By Kind, In The Hosiery Industry, 1982
(Quality in millions of pounds, cost in millions of dollars)

	Women's Hosiery Except Socks (SIC 2251)		Hosiery, n.e.c. (SIC 2252)	
	Quantity	Delivered Cost	Quantity	Delivered Cost
Total	--	$551.2	--	$734.5
Hosiery in the greige, exc. pantyhose	--	45.6	--	204.9
Pantyhose shipped in the greige	--	67.1	--	--
Cotton yarns	5.6	9.6	50.0	78.4
Nylon spun yarns	7.0	22.0	nr	26.6
Acrylic yarns	6.9	17.8	69.6	146.2
Nylon filament yarns	46.9	173.3	25.8	68.4
Spandex filament yarns	8.1	76.2	2.0	10.7
All other yarns	nr	8.1	25.3	56.3
All other materials, components, parts, containers, etc.	--	131.5	--	143.0

n.e.c. not elsewhere classified.
nr not reported.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures (MC82-1-22B)

PRODUCT SHIPMENTS

Pairs

Detailed information on shipments of hosiery by type, in terms of pairs, is compiled on a current basis by the National Association of Hosiery Manufacturers, Charlotte, N.C., based on reports from knitting mills producing a majority of all types of hosiery made in the U.S., plus careful estimates representing the balance of the industry's activity.

Women's & Girls' Hosiery (Knit on 300 Needles or More)

As reported by the NAHM, this is the biggest single classification of hosiery -- totaling 164.9 million dozen pairs in 1985, and representing more than half (53.4%) of all hosiery shipped in 1985. This category includes pantyhose, stockings, tights, socks, etc. Pantyhose accounting for 69.5% of the women's and girls hosiery (knit on 300 needles or more) in 1985 and registered a 5.9% gain in shipments compared with 1982. Opaques have registered the fastest growth.

In 1984, the NAHM released findings in a survey (called the Delphi survey), conducted by Kurt Salmon Associates which developed projections on hosiery shipments to the year 2005, according to survey participants. Annual volume in women's hosiery is expected to grow to 175 million dozen pairs by the year 2005, according to survey participants. This is out of a projected total for all types of hosiery and legwear, amounting to 342 million dozen pairs.

In 1985, knee-highs continued their steady climb in popularity among women while socks and anklets registered a decline.

Men's Hosiery (Size 10 & Up Knit on less than 300 Needles)

Shipments of this classification of men's hosiery totaled 67.9 million dozen pairs in 1985, which was 3.5% below the 1985 total, 8.2% higher than in 1982, and represented about 22% of hosiery shipments of all types last year.

The Delphi survey, referred to above, projected a total of about 71 million dozen pairs of men's hosiery would be shipped in the year 2005. The trend to longer lengths and crew socks was expected to accelerate.

Sizes 8-11, Girls', Boys', Women's

This classification includes stockings knit on less than 300 needles and waist-highs (tights) for all sizes 7 and up knit on less than 300 needles. Shipments in 1985 totaled about 50 million dozen pairs, representing 16.2% of the hosiery industry total.

The NAHM's Delphi survey showed projected growth to 62 million dozen pairs by year 2005.

Sizes 3 - 8 1/2, Infants', Children's

This classification includes styles whose size range from 3 - 6½, 5 - 8½, 7 - 10. It includes waist-highs (tights) with a midpoint size 6 or less knit on less than 300 needles. In 1985, shipments totaled 25.8 million dozen pairs, up 6.9% compared with 1982. The Delphi survey projected the total for year 2005 at 32 million pairs in this classification.

PRODUCT SHIPMENTS

Pairs

Hosiery Shipments, 1982-1985
(Dozens of pairs in thousands)

	1985	1984	1983	1982	% Change 1985/1984
Hosiery, total	308,660	na	308,079	288,704	+ 6.9%
Infants' & children's, sizes 3 - 8½	25,808	26,867	24,482	24,825	+ 4.0
Footsocks	686	740	546	691	- 0.7
Anklets	14,335	15,350	15,002	15,207	- 5.7
Mid-calf/crew	5,257	3,459	1,474	1,559	+ 237.2
Knee-highs	4,433	5,777	6,218	6,459	- 31.4
Waist-highs (tights)	1,069	1,475	1,207	908	+ 17.7
Stockings	28	66	35	1	+2700.0
Women's & girls' hosiery (footsocks, pantyhose, stockings, tights, etc.) (knit on 300 needles or more, total	164,931	na	164,106	153,176	+ 7.7
Pantyhose	114,681	na	117,788	108,242	+ 5.9
Sheer	59,381	64,962	65,694	60,721	- 2.2
Opaque	6,045	4,674	3,320	1,833	+ 229.8
Elastomer (spandex-type yarn in leg ankle/or panty)	47,352	na	47,480	44,858	+ 5.6
Other (including tights)	1,903	1,672	1,294	830	+ 129.3
Stockings	3,654	4,199	4,599	4,638	- 21.2
Non-stretch	1,109	1,355	1,460	1,752	- 36.7
Stretch	2,139	2,431	2,576	2,374	- 9.9
Support	322	334	490	460	- 30.0
Other	84	79	73	52	+ 61.5
Other women's hosiery	46,596	45,970	41,719	40,296	+ 15.6
Footsocks	289	352	473	492	- 41.3
Anklets	609	671	865	870	- 30.0
Knee-highs	45,638	44,882	40,348	38,916	+ 17.3
Mid-calf/crew	60	65	33	18	+ 233.3
Girls', boys', women's, sizes 8-11 (knit on less than 300 needles) total	50,026	51,263	52,794	47,980	+ 4.3
Footsocks	6,252	5,254	5,789	6,814	- 8.2
Cushion	5,281	4,718	5,361	6,398	- 17.5
Non-cushion	971	536	428	416	+ 133.4
Anklets	19,665	19,894	16,609	12,283	+ 60.1
Cushion	7,544	9,199	6,336	4,830	+ 56.2
Non-cushion	12,121	10,650	10,273	7,453	+ 62.6
Mid-calf/crew	5,682	4,267	4,906	4,548	+ 24.9
Cushion	3,683	2,557	3,736	3,493	+ 5.4
Non-cushion	1,999	1,710	1,170	1,055	+ 89.5
Knee-highs	17,889	21,258	24,906	23,776	+ 24.8
Cushion	7,242	7,806	9,008	7,082	+ 2.3
Non-cushion	10,647	13,452	15,899	16,694	- 36.2
Stockings (women's)	77	125	46	67	+ 14.9
Waist-highs (women's tights)	461	510	537	492	- 6.3

(continued)

PRODUCT SHIPMENTS

Pairs

Estimated Hosiery Shipments, 1982-1985
(Dozens of pairs in thousands)
(continued)

	1985	1984	1983	1982	% Change 1985/1984
Men's hosiery (size 10 & up) (knit on less than 300 needles) total	67,895	70,393	66,697	62,723	+ 8.2%
Cushion	34,544	34,543	32,669	31,516	+ 9.6
Non-cushion	33,351	35,850	34,028	31,207	+ 6.9
Footsocks	782	560	327	291	+ 168.7
Cushion	584	310	160	133	+ 339.1
Non-cushion	198	250	167	208	+ 25.3
Anklets	25,386	27,834	26,899	26,376	- 7.3
Cushion	4,740	5,432	5,340	6,449	- 26.5
Non-cushion	20,646	22,402	21,559	20,927	- 1.3
Mid-calf/crew	18,228	17,970	18,488	17,445	+ 4.5
Cushion	9,633	9,183	9,875	10,899	- 11.6
Non-cushion	8,595	8,787	8,613	6,566	+ 30.9
Knee-highs	23,499	24,029	20,983	17,611	+ 33.4
Cushion	19,587	19,618	17,294	14,035	+ 39.6
Non-cushion	3,912	4,411	3,689	3,576	+ 9.4

na not available
* Less than 0.1%.
** According to a special NAHM survey covering June shipments, girls' and women's hosiery represented about 61% of hosiery size 8-11, knit on less than 300 needles, boys', 39% in 1985.

Source: National Association of Hosiery Manufacturers, Hosiery Statistics.

The combined total of hosiery knit on 300 needles or more and under 300 needles (size 8-11), shows total shipments of specific types of women's and girls' hosiery, and boys' hosiery as follows in 1985, based on an NAHM survey covering shipments in the month of June where indicated (*).

PRODUCT SHIPMENTS

Pairs

Estimated Shipments of Specified Types of Hosiery, 1985

	Dozens of Pairs (000)
Women's & girls', specified types, total	79,088
Knee-highs, total	52,257
300 needles or more	45,638
Less than 300 needles*	6,619
Footsocks	6,541
300 needles or more	289
Less than 300 needles*	6,252
Anklets	19,094
300 needles or more	609
Less than 300 needles*	18,485
Mid-calf/crew	1,196
300 needles or more	60
Less than 300 needles*	1,136
Boys', (less than 300 needles)*	16,994
Knee-highs	11,270
Mid-calf/crew	4,545
Anklets	1,179
Footsocks	--

* See page 16.

Seasonal Pattern in Hosiery Shipments
Percent of Unit Shipments By Months, 1985

	Infants'/ Children's	Girls'/Boys'/Women's (Sizes 8-11)	Women's/Girls' (300 Needles +)	Men's (Sizes 10-13)
Total	100.0%	100.0%	100.0%	100.0%
January	7.9	7.4	8.3	6.9
February	8.5	8.0	7.9	7.2
March	8.5	8.6	8.1	7.2
April	7.8	6.6	8.8	6.5
May	8.8	8.4	8.3	8.3
June	10.6	10.8	8.0	9.5
July	9.6	8.7	9.9	9.2
August	7.3	8.1	7.1	8.5
September	8.4	9.0	7.6	8.0
October	8.7	10.1	9.7	9.9
November	7.5	10.1	8.4	11.3
December	6.3	6.0	8.0	7.4

Source: Based on National Association of Hosiery Manufacturers' reports.

PRODUCT SHIPMENTS

Value

As opposed to industry shipments, reported in the section on GENERAL INDUSTRY STATISTICS, product shipments cover the value of hosiery shipped by all producers, including all types of knitting mills. Estimates issued by the Census Bureau, based on the 1983 survey of manufactures, placed the total value of all hosiery shipped that year at $3,085 million, representing a gain of 12.2% over the $2,749.8 million reported in the 1982 census of manufactures.

Value of Shipments of Hosiery, By All Producers: 1977, 1982, 1983
(Millions of dollars)

	1983	1982	1977	% Change 1983/82
Hosiery, total	$3,085.0	$2,749.8	$1,712.7	+ 12.2%
Women's hosiery, except socks (SIC 2251)	1,568.4	1,425.3	819.1	+ 10.0
Finished seamless hosiery, full-length (except pantyhose)	419.9	353.4	723.4	+ 18.8
Finished pantyhose	1,009.1	943.2		+ 7.0
Shipped in greige	94.6	85.6	58.4	+ 10.5
Type not specified	44.8	43.1	37.3	+ 3.9
Hosiery, except women's full-length & knee-length hosiery (SIC 2252), total	1,516.6	1,324.5	893.6	+ 14.5
Men's finished seamless (sizes 10 & up)	731.2	655.0	464.6	+ 11.6
All other seamless (finished)	523.8	452.1	274.3	+ 15.9
Seamless hosiery shpped in the greige except women's full- & knee-length	187.3	155.6	93.5	+ 20.4
Type not specified	74.2	61.9	61.2	+ 19.9

Source: U.S. Bureau of the Census,
1982 Census of Manufactures (MC82-1-22B)

Further details on shipments by product are found in the census of manufactures reports. Based on these reports, it is estimated that the $3.1 billion in manufacturers' shipments in 1983 were distributed as follows:

Estimated Value of Hosiery Shipments By Type; 1983
(Value in millions of dollars)

	Millions of $	Percent
Hosiery, total	$ 3,085.0	100.0%
Women's	1,721.4	55.8
Men's	907.0	29.4
Boys', girls'	283.8	9.2
Infants', children's	172.8	5.6

PRODUCT SHIPMENTS

Findings on value of shipments, as well as pairs shipped where available, from the 1982 and 1977 census of manufactures were reported as shown below.

Quantity & Value of Shipments Of Women's Hosiery (SIC 2251): 1977, 1982

	Quantity (Millions of Doz. Pairs)			Value (Millions of Dollars)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Women's & misses' hosiery (SIC 2251), total*	—	—	—	$1,425.3	$819.1	+ 74.0%
Finished seamless hosiery, full- & knee-length, exc. pantyhose	—	—	—	353.4	(D)	—
Misses finished knee-length socks, sizes 8-11	13.8	2.1	+ 557.1	112.5	14.3	+686.7
Seamless stockings, full- & knee-length finished	—	—	—	240.9	178.6	+ 34.9
Knee-length, stretch & nonstretch	31.3	28.4	+ 10.7	141.6	100.0	+ 41.6
30 denier, stretch & nonstretch	7.9	8.3	- 4.8	56.9	49.6	+ 14.7
Full length, nonfancy, support	0.5	1.1	- 54.5	6.5	10.0	- 35.0
All other finished seamless hosiery	1.7	(D)	—	27.8	(D)	—
Finished pantyhose	—	—	—	943.2	(D)	—
Under 30 denier, sheer stretch	41.7	50.0	- 16.6	313.4	402.5	- 22.1
30 denier or heavier, opaque stretch	14.5	8.3	+ 74.6	208.9	107.6	+ 94.1
Elastomer:						
Control top	17.6	(D)	—	187.6	(D)	—
Leg support	12.1			216.7		
All other miscellaneous sheers	1.2			13.7		
Hosiery shipped in the greige, total	—	—	—	85.6	(D)	—
Full-fashioned & seamless, full & knee length, exc. pantyhose	10.9	(D)	—	27.5	(D)	—
Pantyhose	11.7	4.5	+ 2.6	57.7	22.4	+157.6
Hosiery, n.s.k.	—	—	—	0.4	5.1	- 92.2
All other hosiery, n.s.k.	—	—	—	43.1	37.3	+ 15.5

* See page 3 for definition of SIC code.
(D) Withheld to avoid disclosure
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufacutures, 1982
MC82-I-22B

PRODUCT SHIPMENTS

Value

Quantity & Value of Shipments of Hosiery (SIC 2252): 1977, 1982

	Quantity (Millions of Doz. Pairs)			Value (Millions of Dollars)		
	1982	1977	% Change 1982/1977	1982	1977	% Change 1982/1977
Hosiery (SIC 2252), total*	—	—	—	$1,324.5	$893.6	+ 48.2%
Men's finished seamless	—	—	—	655.0	464.6	+ 41.0
Anklets, natural fiber	16.7	25.1	- 33.5%	139.7	136.3	+ 2.5
Anklets, manmade fiber	34.9	38.1	- 8.4	295.1	222.0	+ 32.9
Mid-calf, natural fiber	4.3	7.4	+ 47.3	37.3	43.9	+102.1
Mid-calf, manmade fiber	6.6			51.4		
Knee, natural fiber	3.1			33.2		
Knee, manmade fiber	7.4	9.7	+ 41.2	56.6	59.1	+104.4
All other, incl. footsocks	3.2			31.0		
All other finished seamless	—	—	—	452.1	274.3	+ 64.8
Women's, misses', girls' & boys' (sizes 8-11):						
Anklets, natural fiber	11.5	8.7	+ 32.1	72.2	37.4	+ 93.0
Anklets, manmade fiber	17.3	21.8	- 20.6	122.5	83.8	+ 46.2
Boys' & girls' exc. anklets:						
Knee, natural fibers	2.0	2.2	- 9.1	14.1	10.1	+ 39.6
Knee, manmade fibers	8.9	10.2	- 12.7	65.0	51.4	- 26.5
All other	2.8	1.5	+ 86.6	31.0	9.6	+222.9
Infants' & chilren's (sizes 3- 8 1/2):						
Anklets, natural fiber	6.2	6.8	- 8.8	33.3	26.9	+ 23.8
Anklets, manmade fiber	10.1	10.6	- 4.7	54.3	42.5	+ 27.8
Knee	3.7	0.8	+362.5	21.4	4.1	+422.0
All other	4.6	0.6	+666.6	31.0	3.2	+868.8
All other finished seamless	—	—	—	7.2	5.3	+ 35.8
Seamless hosiery, shipped in the greige, exc. women's full & knee length, total	—	—	—	155.6	93.5	+ 66.4
Men's, all types	21.1	16.1	+ 31.1	113.2	62.0	+ 82.5
Women's, misses', girls' & boys'	6.7	5.8	+ 15.5	27.2	17.4	+ 56.3
Children's & infants'	3.2	5.1	- 37.3	13.3	13.4	- 0.7
Seamless hosiery, n.s.k.	—	—	—	1.9	0.7	+171.4
Hosiery, n.s.k., total	—	—	—	61.9	61.2	+ 1.1

* See page 3 for definition of SIC codes.
(D) Withheld to avoid disclosure
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
Census of Manufacutures, 1982
MC82-I-22B

PRODUCT SHIPMENTS

Value: Athletic Hosiery & Bodywear

Estimated Sales of Athletic Socks by Leading Manufacturers, 1983, 1984
(Millions of dollars)

	1984	1983
Adams Millis*	$100.0	$45.0
Burlington**	37.0	37.0
Russel National#	36.4	34.0
Wigwam	24.0	22.0
Interwoven**	21.0	21.0
Neuville-Mobile##	17.0	15.0
Ballston	14.0	15.0
Fox River	13.6	6.5
Twin City	13.0	15.0
Ridgeview	12.0	10.5

* Includes Socksmith, ABC Sports, Sporttime and private label
** Interwoven and Burlington are divisions of Kayser Roth. Burlington's figure includes Equipe and private label.
# Includes private label.
## Includes Spalding and private label.

Source: SportStyle, June 17, 1985

Estimated Sales of Bodywear/Exercise Apparel By Leading Manufacturers, 1983, 1984
(Millions of dollars)

	1984	1983
Danskin	$ 75.0#	110.0
Capezio*	50.0	50.0
Flexatard	20.0	19.0
Carushka	12.0	10.0
Tickets	9.0	6.0
Alba-Waldensian**	7.6	10.7
Marika	7.5	5.0
Softouch	7.3	5.0
Stevi Brooks	3.7	3.9

* Includes footwear sales
** Includes hosiery sales
# Danskin's volume in leotards, etc., in 1985 has been reported at $120 million. An influx of California fashion bodywear has also come into the market.

PRODUCT SHIPMENTS

Value: Leading States

Value of Hosiery Shipments By Leading States: 1982
(Millions of dollars)

	Amount	Percent
Women's hosiery		
Finished seamless, except pantyhose (including full-length & knee-length)	$353.4	100.0
North Carolina	268.7	76.0
Pennsylvania	9.2	2.6
Tennessee	22.9	6.5
Finished pantyhose, total	943.2	100.0
North Carolina	518.7	55.0
Virginia	16.5	1.7
Shipped in the greige, total	85.6	100.0
North Carolina	82.8	96.7
Men's hosiery (sizes 10 or larger)		
Finished seamless, total	655.0	100.0
North Carolina	390.5	59.6
Tennessee	79.4	12.1
Pennsylvania	48.3	7.4
Georgia	40.5	6.2
Alabama	23.9	3.6
Virginia	11.4	1.7
Other hosiery		
All other finished seamless hosiery, total	452.1	100.0
North Carolina	259.8	57.5
Tennessee	78.7	17.4
Seamless hosiery shipped in the griege, except women's full-length & knee-length	155.6	100.0
North Carolina	100.7	64.7
Alabama	29.7	19.1
Georgia	12.5	8.0

Source: U.S. Bureau of the Census, 1982 Census of Manufactures MC82-I-22B

PRODUCER PRICE LEVELS

Prices at the factory level have been edging up. As of January 1986, according to the Bureau of Labor Statistics, the average price of women's pantyhose and sheer knee-highs was about 1% higher than in the same month a year ago, and over the average in 1984. Factory prices for men's finished hosiery in January 1986 were also about 1% above the level a year ago, and 1.8% above the 1984 average.

PRODUCER PRICE LEVELS

Producer (Factory) Price Indexes
(June 1984=100)

	1984	January 1985	January 1986
Women's hosiery knit on 300 needles or more & knee-highs	100.3	100.5	101.2
Hosiery n.e.c.	nr	100.6	100.8
Men's finished hosiery	99.8	100.6	101.6

n.e.c. not elsewhere classified
nr not reported

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The strong favorable balance of trade which the U.S. has enjoyed in hosiery was upset in 1984 and 1985 due to the strong value of the U.S. dollar against foreign currencies and to the computer technology available in the Orient which is not available in the U.S. In 1985, according to the National Association of Hosiery Manufacturers, based on U.S. Census Bureau reports, the value of U.S. exports amounted to $27.7 million as compared to imports valued at $66.0 million. In 1985, U.S. hosiery exports were valued at $42.6 million; imports at $23.0 million.

The growing inroad of imported hosiery is becoming a matter of concern in the industry. Most manufacturers agree that pantyhose and basic casual socks, including sport socks, are fairly well isolated from the tide of imported hosiery because they can be made just as inexpensively here as offshore. However, direct importing of casual novelty socks, as well as patterned knee-highs particularly from the Orient, is on the rise.

U.S. manufacturers who are importing hosiery cited the superior quality of yarns, finishing and dyeing, as well as patterns, particularly in Japanese and Korean goods made in mills with advanced computer techology. Licensing agreements are also a factor in off-shore production of designer and brand name hosiery. A trade source estimated that while imports in 1985 represented only about 2% of hosiery sales in the U.S., the figure could increase to nearly 10% by the end of the century.

In 1985, imports of pantyhose increased 43.5% in value and 45.6% in quantity. Imports of primarily cotton hosiery (mainly socks) showed a 66.8% gain in quantity and a 51.3% increase in value of imports in 1985 compared with 1984. Imports of cotton, unornamented hosiery from Korea went up more than six-fold, making that country the top supplier of that type, ahead of Japan. Korea increased its share of imports in other hosiery categories, too, by a wide margin.

FOREIGN TRADE

Imports:

Hosiery Imports & Exports, 1981-1985

	Thousand Dozen Pairs				
	1985	1984	1983	1982	1981
Total imports	10,482	6,221	3,708	2,294	2,193
Pantyhose	2,421	1,663	1,619	1,146	1,265
Other hosiery:					
Cotton	1,160	695	243	85	63
Wool	279	193	138	91	101
Man-made fiber	6,620	3,670	1,708	972	764

	Customs Value (thousands of dollars)*				
	1985	1984	1983	1982	1981
Total value	$66,020	$38,733	$23,019	$14,558	$13,913
Pantyhose	15,256**	10,629	9,520	6,163	6,105
Other hosiery:					
Cotton	10,871	7,184	2,877	1,090	1,163
Wool	6,086	4,223	2,871	2,298	2,533
Man-made fiber	33,807	16,697	7,751	5,007	4,139

Exports:

	Thousand Dozen Pairs				
	1985	1984	1983	1982	1981
Total exports	2,959	3,228	4,693	5,646	7,125
Pantyhose	635	686	966	1,159	1,091
Women's full- and knee-length hosiery	519	713	810	1,126	1,586
Other hosiery	1,805	1,829	2,917	3,361	4,448

	Value (thousands of dollars)				
	1985	1984	1983	1982	1981
Total value	$27,665	$29,735	$42,563	$48,441	$55,684
Pantyhose	6,670	6,578	8,477	9,884	7,224
Women's full- and knee-length hosiery	4,005	6,141	9,214	9,685	11,566
Other hosiery	16,990	17,016	24,872	28,872	38,074

* As valued for customs purposes. Does not include duties, freight or insurance.

** About 11% of this value involves 807 transactions with Costa Rica and covers hosiery previously shipped unfinished from the U.S.

Source: National Association of Hosiery Manufactures based on U.S. Bureau of the Census reports.

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Population, 1984; Projections: 1994, 2005
(Middle series*)

	Number (thousands)			% Change	Percent Distribution		
	1984	1994	2005	2005/1984	1984	1994	2005
MALE							
Total, all ages	115,073	125,464	134,297	+16.7%	100.0	100.0	100.0
Under 5 years	9,329	9,635	8,931	- 4.3	8.1	7.7	6.6
5 to 9 years	8,296	9,866	9,094	+ 9.6	7.2	7.9	6.8
10 to 15 years	10,708	11,245	11,698	+ 9.2	9.3	9.0	8.7
16 years & over	86,742	94,718	104,574	+20.5	75.4	75.4	77.9
16 - 19	7,653	6,712	8,058	+ 5.3	6.6	5.3	6.0
20 - 34	31,522	29,725	27,416	-13.0	27.4	23.7	20.4
35 - 54	25,975	35,187	40,769	+56.9	22.6	28.0	30.4
55 - 64	10,375	9,793	14,060	+35.5	9.0	7.8	10.5
65 & over	11,217	13,300	14,271	+27.2	9.7	10.6	10.6
Median age (years)	29.9	33.0	36.0	+20.4	--	--	--
FEMALE							
Total, all ages	121,343	132,251	141,381	+16.5%	100.0	100.0	100.0
Under 5 years	8,904	9,188	8,518	- 4.3	7.3	6.9	6.0
5 to 9 years	7,924	9,415	8,678	+ 9.5	6.5	7.1	6.1
10 to 15 years	10,236	10,745	11,167	+ 9.1	8.4	8.1	7.0
16 years & over	94,279	102,903	113,018	+19.9	77.7	77.9	80.0
16 - 19	7,357	6,426	7,707	+ 4.8	6.1	4.9	5.5
20 - 34	31,205	29,068	26,706	-14.4	25.7	22.0	18.9
35 - 54	27,115	36,202	41,249	+52.1	22.3	27.4	29.2
55 - 64	11,834	11,002	15,399	+30.1	9.8	8.3	10.9
65 & over	16,768	20,205	21,957	+30.9	13.8	15.3	15.5
Median age (years)	32.4	35.6	39.2	+21.0	--	--	--

* Middle of a series of three projections, each based on alternative assumptions as to future fertility, mortality, and net immigration levels. Includes Armed Forces overseas.

Source: U.S. Bureau of the Census,
Current Population Reports,
Series P-25, No. 952 (May 1984).

THE POTENTIAL MARKET

The market potential for women's hosiery has expanded not only due to the growth in population but also to the rapid increase in the number of women in the labor force. This group requires more apparel than nonworking women and is the most open to new fashion approaches in color and texture. As of December 1985, 51,631,000 women were in the labor force--55% of the noninstitutional female population (age 16 and older). Of these 48,288,000 were employed. This compares with an average of 31,257,000 women employed in 1972.

A much greater percentage of women are now in managerial or professional occupations which require more emphasis on dress. In 1985, this group represented 23.4% of all employed women compared with 17.0% in 1972.

Market potential for men's socks continues to be enhanced by the growing interest in variety, patterns such as argyles, in color and fashion in the entire wardrobe. The greater emphasis on activewear and participation in fitness activities has spurred the market for athletic hosiery and many new merchandising techniques have been adopted by a greater variety of retailers who are catering to this market.

Socks for infants' and children should benefit from an increase in birth totals.

Consumption

Per Capita Consumption of Hosiery Based on Supply*

Year	Total Pairs	Infants'/ Children's**	Boys', Girls', Women's Sizes 8-11***	Women's#	Men's##
1985	15.9	9.2	17.3	20.6	9.4
1984	16.0	9.8	16.4	20.4	9.7
1983	15.9	8.8	16.4	21.0	9.1
1982	14.9	9.0	14.7	19.7	8.5
1981	15.9	10.7	17.6	19.2	9.6
1980	15.2	10.2	15.1	19.3	9.1

* Shipments by U.S. mills plus imports, less exports.
** Includes boys and girls through 9 years of age.
***Includes males and females 10 to 14, and females 15 to 24 years of age.
# Includes females age 15 and over.
## Includes males age 15 and over.

Source: National Association of Hosiery Manufacturers

In viewing the entire hosiery market, Kurt Salmon Associates anticipated a 3% increase in unit sales in 1986, compared with a 1% gain in 1985 over 1984.

Year-to-Year Changes in Units Purchased By Consumers

	Actual		Estimated	Projected
	1983/82	1984/83	1985/84	1986/85
Hosiery, total	- 2%	- 2%	+ 1%	+ 3%
Women's pantyhose	+ 3	- 5	+ 1	+ 4
Socks, female	+ 1	+ 2	+ 4	+ 3
Socks, male	- 4	0	0	+ 1

Source: Kurt Salmon Associates: The KSA Perspective: 1986 Outlook

RETAIL SALES

As noted, retail sales of hosiery of all types is estimated at approximately $7.0 billion. No official figures are available on sales by outlet type, but a trade source has compiled the following estimate on unit sales distribution for the year 1984.

Hosiery Market Share (Units) By Outlet Type
(Including Men's, Women's, Boys' & Girls)

	Percent
Total hosiery sales	100.0%
Discount/variety stores	33.0
Food/drug stores	28.9
Department stores	15.9
Sears, Penney, Ward	10.0
Mail order	8.1
Other	4.3

Source: Chain Store Age, General Merchandise Trends, July 1985

Market shares by type of outlet vary, of course, by type of hosiery.

Women's Hosiery/Legwear/Bodywear

Total sales of all types of women's hosiery/legwear are estimated at close to $4.0 billion in 1985, including an estimated $2.4 billion in pantyhose and casual socks.

Upscale hosiery including sheer and fashion pantyhose, other fashion legwear, bodywear, etc., is primarily sold in department and specialty stores, with special brand names, designer names and private labels controlling this market. Hanes is reported to be the top-selling supplier in department and specialty stores, garnering more than a third of sales in this market segment. Their L'eggs brand (Sara Lee Corp.) is the top-seller in food/drug/discount stores.

Brands which have adopted a strong package-goods merchandising approach dominate in the supermarket/drug store/discount store market, with L'eggs still the best-selling brand overall. However, to an increasing extent, large discounters are handling upscale branded lines, or developing their own brands to trade up. Designer names such as Calvin Klein, Christian Dior, Charles Jordan, are also making strong statements in fashion hosiery.

Bodywear/exercise wear has become an important part of the big stores' hosiery departments, and this classification is expected to continue to grow. The use of higher-priced fabrics containing Lycra spandex has increased the unit price and raised dollar figures. Leotard sales now total well over 30 million units and, according to figures compiled by DuPont, retail sales for all ages exceeds $300 million, with about $230 million in the segment for females age 14 years and over.

RETAIL SALES

Women's Hosiery/Legwear/Bodywear

According to the 1982 census of retail trade compiled by the U.S. Census Bureau, the market for women's hosiery/legwear of all types represented by general merchandise and specialty stores, only, amounted to $2,360 million, of which department stores, including department store outlets operated by Sears and Penney, as well as discount department stores, accounted for 64.2%.

A trade source (Supermarket Business) has estimated that sales of women's hosiery in grocery stores amounted to $601.9 million in 1982. Adding this to the Census Bureau's reported figures for major outlets in the general merchandise store/specialty store classification gives a total of $2,962.5 million for the year 1982.

Of this sales total, department stores held a 51% share; specialty stores (including women's ready-to-wear stores, hosiery specialty stores and family clothing stores), 25%; grocery stores, 20%; variety stores, about 4%. (Drug store sales have not been included in these calculations, as figures are not available. However, total sales of women's and girls' wear of all types in drug stores amounted to only $114 million in 1982.)

Trade sources indicate that with the proliferation of fashion choices in women's hosiery, the market share held by grocery stores and drug stores has declined since 1982.

Women's Hosiery Sales in Reported Outlet Types: 1982
(In retail establishments with payroll)

	Establishments		Sales by Outlet Type	
	Number	Percent	Thous. $	Percent
Hosiery sales, reported total	48,940	100.0	$2,360,542	100.0
Department stores*	9,666	19.8	1,515,715	64.2
Women's ready-to-wear stores	18,252	37.3	432,584	18.3
Women's hosiery specialty stores	2,273	4.6	89,373	3.8
Family clothing stores	8,658	17.7	212,370	9.0
Variety stores	10,091	20.6	110,500 (e)	4.7

* Includes discount department store chains and independents and national chains.

(e) estimated

Source: Based on U.S. Bureau of Census, 1982 Census of Retail Trade.

Women's Hosiery Sales in Grocery Stores: 1982-1984
(thousands of dollars)

	1984	1983	1982
Women's hosiery, total	$726,829	$ 663,740	$601,930
Pantyhose	718,656	655,110	592,320
Stockings	8,173	156,580	9,610

Source: Supermarket Business, Annual Consumer Expenditures Study

The latest figures available which show the variations in the pattern of sales share by outlet type based on type of women's hosiery are from Stores Magazine, (June 1981) for the year 1980.

Women's Pantyhose & Knee-high Sales Share By Type of Retailer, 1980

	Non-Support	Support	Knee-Highs	Control Top	Panty Top	Total Market
Total Sales	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Department/specialty stores	19.2	16.5	11.0	26.0	23.2	18.5
General mdse. chains (Sears, Penney, Ward)	9.0	9.5	8.6	14.0	9.4	11.5
Discount/variety stores	25.2	14.3	39.7	20.0	26.3	29.2
Grocery stores/supermarkets	28.4	33.8	22.4	25.8	15.7	24.2
Drug stores	9.9	15.4	12.9	10.1	8.7	10.9
Other outlets	8.3	10.5	5.4	4.1	16.7	5.7

Source: STORES (June 1981) (Based on MRCA, A.C. Nielsen)

Men's Hosiery

Total retail sales of men's hosiery of all types are estimated at $1.8 billion in 1985, up from $1.6 billion in 1984.

Information on sales by type of outlet is limited, as this classification is not separately reported in 1982 census of retail trade merchandise line sales reports. A trade source, Supermarket Business, estimated total sales in grocery stores in 1984 at $50.6 million.

On a unit basis, department stores in 1984 accounted for 16% of total units sold; K-mart, the major discount store outlet, had a 15% share; Sears, 9%; specialty stores, 5%, with the remainder held by variety, drug, discount and grocery stores, according to Apparel Merchandising (June 1985).

At most department stores, basic black, brown and navy socks are still accounting for the major share of sales. However, fashion business and designer names are getting stronger, accounting for 10% to 25% of sales in upscale department stores.

RETAIL SALES

Men's Hosiery (continued)

Women are said to purchase about 70% of men's socks, and this is the factor in the growing acceptance of multi-hued and patterned hosiery for men. Women, too, can relate to the designer names now found in men's hosiery. All three major classifications of men's hose -- dress, casual and athletic -- are becoming fashion items to an increasing degree, rather than staples.

Estimated Value of Total Consumption of Men's Hosiery
& Amount Spent in Grocery Stores: 1982-1984
(thousands of dollars)

Men's Hosiery	Total Consumption*	Amount Spent in Grocery Stores
1984	$1,331,646	$ 50,588
1983	1,218,340	45,740
1982	1,139,700	41,650

* Estimated by SB on the basis of total supply at grocery store prices.

Source: Supermarket Business: Annual Consumer Expenditures Study

RETAIL MERCHANDISING & OPERATING RESULTS

Women's Hosiery Departments

Women's Hosiery Department Merchandising & Operating Results, 1984
Compared With Total Adult Female Intimate Apparel & Accessories Division
(Selected median results)

WOMEN'S/FAMILY SPECIALTY STORES (With Total Sales Over $1 Million)	Mdse. Division: Adult Female Intimate Apparel & Acces. (26)*	Department: Women's Hosiery (18)*
Cumulative markon %	52.8	51.1
Markdowns - % of net retail sales	10.2	14.2
Gross margin (incl. cash discounts) % of net sales	44.4	45.9
Stock turns (times) at retail	2.3	2.5
Net sales % change from 1983	+ 9.6	+ 4.0
Net sales % of mdse. div. (intimate apparel, access.)	100.0	10.3
$ sales per sq. ft. of selling space (main or largest selling unit)	$193.40	$169.10

(continued)

Women's Hosiery Departments (continued)

Women's Hosiery Department Merchandising & Operating Results, 1984 Compared With Total Adult Female Intimate Apparel & Accessories Division
(Selected median results)
(continued)

DEPARTMENT STORES (With Total Sales Over $1 Million)	Mdse. Division: Adult Female Intimate Apparel & Acces. (106)*	Department: Women's Hosiery (94)*
Cumulative markon %	52.8	49.1
Markdowns - % of net retail sales	14.8	10.2
Gross margin (incl. cash discounts) % of net sales	45.9	43.9
Stock turns (times) at retail	2.5	2.6
Net sales % change from 1983	+ 8.1	+ 5.8
Net sales % of mdse. div. (intimate apparel, access.)	100.0	12.5
$ sales per sq. ft. of selling space (main or largest selling unit)	$169.10	$184.00

* Number of firms reporting.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1984.

Men's Hosiery Departments

Typical Operating Results in Men's Hosiery in Men's Wear Stores, 1984
(Median results)

Men's hosiery	Total Reporting Firms		Firms Handling Men's Wear Only		Firms Handling Women's Wear	
% to total furnishings sales	6.0	(87)	6.1	(36)	5.9	(51)
% to total store sales	1.1	(87)	1.3	(36)	1.0	(51)
% change in sales 1982/1981	+ 6.7	(66)	+ 6.3	(28)	+ 7.6	(38)
Markdowns-% of sales	3.1	(63)	2.4	(27)	4.7	(36)
Inventory turnover	2.1	(44)	2.2	(19)	2.1	(25)

Note: Figures in parentheses are the numbers of firms reporting data.

Source: Menswear Retailers of America, Business Newsletter Section II, 1984 Annual Business Survey, Men's Store Operating Experiences

Men's Hosiery Departments (continued)

Men's Hosiery Department Merchandising & Operating Results, 1984 Compared With Total Men's Wear Departments In Department Stores With Annual Sales Over $1 Million

(Selected median results)

	Total Adult Male Apparel (104)*	Men's Hosiery (15)*
Cumulative markon %	51.0	50.7
Markdowns - % of net retail sales	19.6	8.6
Gross margin (incl. cash discounts)	41.9	46.9
Stock turns (times) at retail	2.7	3.3
Net sales % change from 1983	+ 9.0	+ 9.2
Net sales % of adult male apparel	100.0	3.2
$ sales per sq. ft. of selling space (main or largest selling unit)	$167.20	nr

* Number of firms reporting. (It should be noted that only 15 department store companies broke out the data on men's hosiery. This compares with 90 reporting on women's hosiery).

nr not reported.

Source: National Retail Merchants Association: Department Store & Specialty Store Merchandising & Operating Results of 1984

RETAIL ADVERTISING

The pattern in newspaper advertising run by retailers in 1984, as tracked by the Advertising Checking Bureau, shows a peak in September/October and in February in 1984.

Women's Hosiery Ad Linage in Newspapers 1984

(Percent of annual total by months)

Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
100.0%	9.3	11.2	8.4	8.2	9.5	2.8	6.4	5.9	11.6	10.6	8.6	7.5

Source: Newspaper Advertising Bureau, Inc.: 1986 Newspaper Advertising Planbook

BUYING HABITS

Women's Hosiery

In recent years, to meet the problem of rapidly proliferating brands and styles in women's pantyhose, discounters in some cases have cut back to offering two sizes in each style, rather than the usual three or more. In 1985, the trade publication Apparel Merchandising had a survey conducted by the Gallup Organization among women to determine the importance of sizing and other factors in their pantyhose purchases.

Asked which brand of panty hose they usually buy, 46% said they buy L'eggs; 16%, No-Nonsense; 12%, Hanes, 12%, a store brand; 14%, other brands. Brand loyalty increases with income, according to this study, increasing from about a 67% rate among women with incomes below $20,000 to 90% among women in the $40,000-and-over bracket. Availability of a brand in three or more sizes appears to be a strong factor in brand loyalty. Fit ranked first among important pantyhose characteristics ranked by women respondents.

Characteristics Most Important In Selecting Pantyhose
(Percent of respondents)

	Percent
Best fit	52%
Durable	21
Economical price	18
Color selection	6
Pattern selection	1
No answer	2
Total respondents	100%

Source: Apparel Merchandising (April 1985)

Women's Hosiery/Legwear/Socks
Average Purchase (in Units) Per 1,000 Households Each Month, 1984

	Pantyhose/Tights	Hosiery/Socks
Monthly average	962.5	668.6
January	915.2	568.2
February	888.7	623.3
March	1,199.4	751.4
April	1,014.3	597.4
May	988.2	621.9
June	941.6	735.8
July	577.5	541.0
August	812.2	541.6
September	1,089.3	733.4
October	862.8	641.1
November	941.3	701.6
December	1,219.9	966.1

Source: Newspaper Advertising Bureau Inc., based on MRCA Information Services

Teen Girls' Hosiery (continued)

In September 1984 Seventeen Magazine conducted a survey on apparel purchases made by teenage girls in preparation for going back to school. Results of the survey were projected to a total U.S. population of 8,543,000 teenage female students.

Hosiery Purchases For Back-To-School Wardrobes

	% of total Purchasing Hosiery	Purchases		Expenditures	
		Pairs (000)	%	Thous. $	%
Total hosiery purchases	86.6%	64,043	100.0%	$179,934	100.0%
Socks-knee length	27.3	8,560	13.4	21,116	11.7
-ankle	49.2	16,803	26.2	36,286	20.2
-crew	15.1	4,812	7.5	12,164	6.8
Panty hose-natural	42.0	10,191	15.9	24,949	13.9
-colored	33.6	6,797	10.6	17,517	9.7
-opaque	7.0	1,119	1.7	2,898	1.6
Stockings-knee length	23.5	6,676	10.4	13,551	7.5
-natural	19.1	4,136	6.5	9,347	5.2
-opaque	7.3	1,203	1.9	3,152	1.7
Leotards or tights	13.2	2,193	3.4	26,160	14.5
Body stockings	1.3	150	0.2	1,716	1.0

Source: Seventeen's Back-To-School Study, 1985

Seventeen Magazine has also released a report on spending patterns among female teenagers (age 12 through 19 years) in a 3-month period in 1985 (The 1985 TRU Report). Projecting to the total population, 14,115,000 in this age group, the study found the following had purchased hosiery, or had hosiery purchased for them by parents.

Items Purchased Specifically For Teen Girls in Past 3 Months By Girls or Parents

	Number of Girls Purchasing	Percent
Pantyhose	8,130,000	57.6%
Legwear (socks, tights, leg warmers)	8,102,000	57.4

Source: 1985 TRU; U.S. Census Bureau

Teen Girls' Hosiery (continued)

According to Seventeen Magazine's 1985 Spring Apparel Study, teen girls spent a total of $15.5 billion for their new wardrobes in the areas of outerwear, innerwear and footwear in the Spring, 1985. Purchases of hosiery and legwear of all types amounted to a projected total of $456.5 million, about 3% of total apparel/footwear expenditures.

Hosiery/Legwear Purchases For Teenage Girls, Spring 1985
(All figures in thousands)

	Number Purchasing	Number Purchased	Total Expenditures
Hosiery			
Pantyhose-natural	7,433	26,165	$ 75,094
-colored	4,342	12,938	48,000
-opaque	576	1,492	4,759
Socks-Knee length	5,731	30,606	91,512
-ankle	4,129	13,048	39,405
-crew	2,015	6,408	17,494
-thigh-highs	213	213	635
Regular stockings			
-knee length	2,891	7,547	16,905
-natural	1,300	3,979	9,749
-opaque	413	728	1,514
Leotards or tights	2,515	3,595	21,498
Body stockings	212	271	1,577
Knit tights	88	88	536
Total girls buying hosiery (other than pantyhose)	11,975	107,078	$328,678
Total buying pantyhose	10,599	40,595	127,853

Source: Seventeen's 1985 Spring Apparel Study

Men's Hosiery

Trade sources estimate that fully 70% of men's hosiery is purchased for men by women. This has been a factor in the growing importance of designer brands and fashion elements in men's hosiery; the percentage too is a factor, in the lack of information on men's real preferences and shopping habits.

Men's Hosiery/Socks
Average Purchase Rate (In Units) Per 1,000 Households Each Month 1984

Monthly Average	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
624.2	418.8	361.1	495.2	400.3	357.7	569.8	523.0	668.2	604.4	511.0	768.3	1,812.3

Source: Newspaper Advertising Bureau Inc., based on
MRCA Information Services

Men's Hosiery (continued)

Distribution of Reported Men's Hosiery Purchases By Type, 1980 - 1983

	Based on Pairs Purchased			Expenditures
	1983	1981	1980	1983
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Type of men's hosiery:				
Dress socks	25.9	28.9	31.3	30.4
Support socks	1.2	1.3	1.5	2.2
Casual socks	23.1	23.0	22.7	21.3
Athletic socks	32.3	25.5	23.8	30.2
Work socks	13.7	17.3	17.7	12.1
Other socks	3.7	4.0	3.0	3.9

Source: NPD Special Industry Services,
Textile and Apparel Market Index

Men's Hosiery

Distribution of Reported Purchases of Hosiery For Men Age 17 & Older By Place of Purchase & By Price Classification, 1982, 1983

	1983		1982	
	Pairs	Expenditures	Pairs	Expenditures
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	13.5	18.6	13.0	18.6
Mass mdsrs. (incl. Sears, Ward, Penney, K mart)	35.4	32.4	34.7	31.4
Discount stores	25.1	21.1	25.1	22.0
Specialty stores	5.7	8.1	4.0	5.3
Variety stores	6.4	5.3	7.2	6.0
Grocery stores/supermarkets	2.0	3.1	4.8	4.1
Other	11.8	11.4	11.2	12.6
Price Paid				
Under $1.50	74.4	51.5	73.9	52.0
$1.50 to $1.99	11.6	15.2	13.3	17.7
$2.00 to $2.49	4.7	7.8	4.3	7.3
$2.50 or more	9.3	25.5	8.5	23.0

Source: NPD Special Industry Services,
Textile and Apparel Market Index

BUYING HABITS

Boys' Hosiery (continued)

Purchases of boys' hosiery reported in NPD's service tracing purchases among 6,500 nationally representative families showed the following distribution patterns in 1983 and 1982:

Distribution of Boys' Hosiery Purchases by Type, 1983

	Pairs	Expenditures
Total reported purchases	100.0%	100.0%
Dress socks	5.9	5.6
Casual socks	33.9	38.7
Athletic socks	53.6	49.7
Other socks	6.6	6.0

Distribution of Reported Purchases of Boys' Hosiery By Place of Purchase & By Price Classification

	1983		1982	
	Pairs	Expenditures	Pairs	Expenditures
Total reported purchases	100.0%	100.0%	100.0%	100.0%
Outlet Type				
Department stores	8.5	10.0	10.4	11.3
Mass mdsrs. (incl. Sears, Ward, Penney, K-mart)	43.3	40.5	42.0	40.1
Discount stores	25.9	24.4	28.1	26.4
Specialty stores	3.8	5.9	3.8	5.6
Variety stores	7.7	6.8	6.0	5.5
Grocery stores/supermarkets	3.1	3.0	2.8	2.8
Other	7.8	9.4	6.9	8.2
Price Paid				
Under $1.00	70.4	52.4	68.1	50.0
$1.00 to $1.49	19.3	23.9	22.7	28.2
$1.50 or more	10.3	23.7	9.2	21.8

Source: NPD Special Industry Services,
Textile and Apparel Market Index

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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The Sports/Fitness/ Leisure Markets

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Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst

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E. B. Gold, Manager
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THE SPORTS/FITNESS/LEISURE MARKETS

Market Trends

The only clearly defined industry segment within the broad classification of products represented in the sports/fitness/leisure market is the sporting goods/athletic goods industry. Following a good year in 1984, when shipments rose 11.2% in terms of current dollars, the value of shipments of sporting/athletic goods in 1985 went up only 1.2%. A real gain, discounting inflation, of only 1% is anticipated in 1986, according to the U.S. Department of Commerce.

Factors contributing to the slowdown included the saturation of markets for certain products, the growing market share held by imports, and an overall slowdown in consumer spending.

Imports of sporting/athletic goods increased almost 10% in 1985, reaching a 27% share of the U.S. market, while exports declined 6% in 1985. It is hoped that the weaker dollar will help export sales pick up in 1986, although the decline in the value of the dollar seems to have been halted.

A stonger economy, and the feeling of well-being that has been sparked by the sharp rise in the quality markets should help sales in the sports/fitness/leisure area. Women are participating in active sports and in aerobics and other fitness activities to an increasing extent and are a strong factor in the outlook for a pickup in business this year.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

In its broadest sense, the sports/fitness/leisure market covers a very wide range of products -- from tennis balls to aircraft. This FACT FILE, however, is limited to the product classifications of the type sold through retail oulets such as sporting goods stores and general merchandise stores. Boats, airplanes, etc., sold through specialized dealers, are not included, nor are products classified as "toys".

Industry statistics compiled by the U.S. Department of Commerce delineate trends in two major components of the Sports/Fitness/Leisure complex: the sporting/athletic goods (equipment), and the motorcycle/bicycle industries. Other major classifications -- including athletic uniforms, authentic activewear, athletic footwear, as well as sports accessories items -- are components of other unrelated broad industry classifications. Information on these are however, covered in product information (shipments, sales, etc.) in this Fact File where available.

A measure of trends and the outlook for the U.S. sporting goods industry and motorcycle/bicycle industry is included in the annual report, U.S. Industrial Outlook, compiled by the International Trade Administration, U.S. Department of Commerce.

GENERAL INDUSTRY STATISTICS

Recent Performance & Forecast: Sporting/Athletic Goods & Motorcycle/Bicycle Industries

	Millions of Dollars				% Change			
	1983	1984(e)	1985(e)	1986	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting goods/athletic goods*								
Value of industry shipments								
Current $	$3,334	$3,708	$3,770	nr	-1.3	+11.2	+1.7	—
Constant 1982 $	$3,296	$3,690	$3,778	$3,815	-2.4	+12.0	+2.4	+1.0
Motorcycles/bicycles, parts**								
Value of industry shipments								
Current $	$1,436	$1,553	$1,433	nr	+7.1	+ 8.1	-7.7	—
Constant $	$1,420	$1,531	$1,422	$1,448	+5.9	+ 7.8	-7.1	+1.8

* SIC 3949. See page 3 for a definition.
** SIC 3751. See page 3 for a definition.
(e) estimated
(f) forecast
nr not reported

Source: U.S. Department of Commerce,
International Trade Administration:
1986 U.S. Industrial Outlook

As noted above, the projected value of shipments of the sporting goods industry looks for a real increase (constant dollars) of 1% in 1986 compared with 1985, compared with a 2.4% gain in 1985, and 12% in 1984. The long-term outlook is for a compound annual increase of 2% in real domestic shipments between 1986 and 1990. Domestic shipments in the bicycle industry are expected to increase 2-2.5% over the next five years, according to the ITA. A 1.8% increase (in constant dollars) was the forecast for 1986, following a 7.1% decline in the real value of industry shipments in 1985.

A complete census of all manufacturers with payroll in the U.S. is compiled every five years by the U.S. Bureau of the Census. Results from the latest census, covering the year 1982, are summarized below. During intercensal years, the Bureau conducts annual surveys covering a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity.

From 1977 to 1982, the number of companies in the U.S. sporting/athletic goods industry declined from 1,757 to 1,452; while the number of plants dropped from 1,879 to 1,553 and then to 1,494 in the 1983 count. Production worker employment declined about 27% from 1977 to 1983, from 57,200 to 44,900.

Aided by inflation, the value of industry shipments in 1982 ($3,376.8 million) was 39.2% above the 1977 total ($2,425.1 million). In 1983, however, the value declined 1.3% from the 1982 total.

GENERAL INDUSTRY STATISTICS

U.S. manufacturing firms in the motorcycle/bicycle industry also declined between 1977 and 1982, dropping from 343 to 269. The number of plants fell from 350 in 1977 to 273 in 1982, then to 263 in the latest count covering 1983. Employment was down 22% in 1983 compared with 1977; however, industry shipments, in terms of current dollars, unadjusted for inflation, were up 42.5% in 1983 compared with the 1977 total.

Sporting/Athletic Goods, n.e.c. (SIC 3949*)

	1983	1982	1977
Number of companies	na	1,452	1,757
Number of establishments, total**	1,494	1,553	1,879
With 20 employees or more	442	460	496
Employees, total (thous.)	44.8	47.8	57.2
Production workers (thous.)	33.7	36.0	46.1
Payroll (mil. $)	$ 663.1	$ 677.7	$ 525.9
Value added by manufacture (mil. $)#	$1,759.3	$1,778.8	$1,273.6
Value of industry shipments (mil. $)##	$3,333.9	$3,376.8	$2,425.1
Capital expenditures, new (mil. $)	na	76.5	62.7

Motorcycles, Bicycles & Parts (SIC 3751*)

	1983	1982	1977
Number of companies	na	269	343
Number of establishments, total**	263	273	350
With 20 employees or more	68	67	63
Employees, total (thous.)	12.2	13.0	15.6
Production workers (thous.)	9.9	10.4	15.3
Payroll (mil. $)	$ 238.9	$ 224.9	$ 168.9
Value added by manufacture (mil. $)#	$ 545.7	$ 402.5	$ 369.8
Value of industry shipments (mil. $)##	$1,436.1	$1,341.1	$1,007.6
Capital expenditures, new (mil. $)	$ 26.5	23.1	24.1

n.e.c. not elsewhere classified
nr not reported

* Manufacturers are classified by industry under the Standard Industrial Classification system (SIC), determined by the principal products made as shown below:

** Each business location is counted as a separate establishment.

SIC 3949 This industry comprises establishments primarily engaged in the manufacture of sporting and athletic goods such as fishing tackle; golf and tennis goods; baseball, football, basketball and boxing equipment; billiard and pool tables; roller skates and ice skates; gymnasium and playground equipment; bowling alleys and equipment.

SIC 3751 This industry comprises establishments primarily engaged in the manufacture of motorcycles, bicycles and similar equipment and parts. Establishments primarily engaged in the assembly of motorcycles or bicycles from purchased parts are also included in this industry.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of the same manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments represents the net selling values, f.o.b. plant, after discounts and allowances, and excluding freight charges and excise taxes. This value includes both products described as primary to the industry and secondary products and miscellaneous receipts (including receipts on contract work and resales). The total value of product shipments by seondary producers, is covered in the SHIPMENTS section of this Fact File.

Source: U.S. Bureau of the Census:
1982 Census of Manufactures,
Annual Survey of Manufactures, 1983

Employment & Earnings

Current information on a monthly basis covering employment, hours and earnings in the U.S. sporting/athletic goods industry is compiled by the Bureau of Labor Statistics, Department of Labor. The annual averages show the steady decline in activity in domestic plants from 1977. In that year, the BLS reported that total employment in the industry averaged 63,300. The average declined each year until 1983, when it reached a low of 50,800. There was a substantial pickup in business in 1984, and sporting/athletic goods industry employment increased over 9% reaching a monthly average of 55,500. In 1985 it averaged 1.4% below 1984, reading 54,700; but early 1986 figures indicate a pickup in employment compared with 1985 levels.

Employment & Earnings in the Sporting & Athletic Goods Industry (SIC 3949)

	February Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Sporting & athletic goods:						
All employees (thous.)	56.0	55.7	+ 0.5%	54.7	55.5	- 1.4%
Production workers (thous.)	43.6	42.2	+ 3.3	41.7	42.5	- 1.9
Average weekly earnings	$273.88	$260.35	+ 5.2	$271.96	$273.50	- 0.6
Average weekly hours	40.1	38.4	+ 4.4	39.3	40.7	- 3.4
Average overtime hours	2.4	1.5	+60.0	1.9	2.9	-34.5

Source: U.S. Bureau of Labor Statistics,
Employment & Earnings

Employment data issued by the Bureau of Labor Statistics and by the Census Bureau are not directly comparable due to differences in methodology used by each agency in compiling data.

GENERAL INDUSTRY STATISTICS

Industry Concentration

According to the 1982 Census of Manufactures, there were 1,452 companies classified in the domestic sporting/athletic goods industry, operating 1,553 plants. This number was down from 1,878 plants operated by 1,757 companies in 1977. Although several of the leading producers are divisions of large diversified multinationals, in 1982 and in 1983, 70.4% of the plants in this industry had fewer than 20 employees. These small plants tend to emphasize craftsmanship and specialties, and easily enter and exit the industry.

The large multinationals generally produce goods that require substantial capital investment and technological sophistication. These firms benefit from brand name recognition and economies of scale in marketing, research, and development. The major manufacturers often engage in importing, exporting, overseas production, contract work, and licensing the use of their trade names. Some of the major companies are Wilson Sporting Goods, a division of Pepsico, Inc.; AMF, Inc.; Brunswick Corp., and Questor Corp. (Spalding Sports). Other large, diversified companies have interests in the sporting goods industry, including Alleghany International, American Brands, Campbell Soup and others.

Of the 1,452 companies classified in SIC 3949 (sporting/athletic goods industry), 162 (11.1%) were multiunit companies, according to the 1982 census. These multiunits, however, had 62.3% of industry employment and accounted for 70% of the value added by manufacture within the industry, 70% of the total value of industry shipments. (1982 Census of Manufactures, MC82-S-5: Subject Series: Type of Organization.)

The labor cost advantages of foreign producers of bicycles, particularly those in the Far East, have been a major factor in a decline in the number of U.S. companies in this industry. (U.S. producers have responded by importing bicycles themselves.) The motorcycle industry is, of course, highly concentrated. One American firm, Harley-Davidson, and two Japanese firms, Honda and Kawasaki, are the major producers of motorcycles in the U.S. (About two-thirds of the market are held by imports, with Honda accounting for about 58%).

The 1982 census of manufactures counted 269 companies in SIC 3751 (motorcycle/bicycle/parts industry), operating 273 plants. Comparable figures in 1977 were 343 and 350, respectively. The Type of Organization report (cited above) reported that 25 companies were multiunits (9.3% of the total). The multiunits accounted for 74% of industry employment, 77% of value added by manufacture within the industry, and 82% of industry shipments.

The Census Bureau has just released a report on Concentration Ratios in Manufacturing, based on the 1982 census, which includes the following information.

GENERAL INDUSTRY STATISTICS

Industry Concentration

Share of Value of Industry Shipments Accounted For By the Largest Companies

			Value of Industry Shipments*			
	No. of	Total	Percent accounted for by largest companies:			
Industry	Companies	(mil.$)	4 largest	8 largest	20 largest	50 largest
Sporting/athletic goods:						
1982	1,452	$3,376.8	17%	28%	44%	62%
1977	1,757	2,425.1	21	28	41	59
1972	1,441	1,729.2	28	37	50	66
Motorcycle/bicycle/parts:						
1982	269	1,341.2	59	79	88	94
1977	343	1,007.6	66	81	89	94
1972	219	659.5	65	78	92	97

Source: U.S. Bureau of the Census,
1982 Census of Manufactures:
Concentration Ratios in Manufacturing (MC82-S-7)

* For an explanation of this term, see page 4.

In terms of individual plants, in the sporting/athletic goods industry in 1982, according to the census, 113 plants with 100 or more employees (7.3% of the total) accounted for 64% of value added by manufacture within the industry and for 62.8% of industry shipments.

In the motorcycle/bicycle/parts industry, nine plants with 250 or more employees (3.3% of the plants classified in this industry) accounted for 54.3% of value added by manufacture and over 59% of industry shipments.

Concentration by Employment Size, 1982

	Establishments		Value added by Manufacture		Industry Shipments	
	Number	Percent	Mil. $	Percent	Mil. $	Percent
Sporting/athletic goods:						
industry --	1,553	100.0%	$1,778.0	100.0%	$3,376.8	100.0%
By establishment (plant) size:						
Under 20 employees	1,093	70.4	184.1	10.4	354.6	10.5
20 - 49 employees	246	15.8	235.1	13.2	465.9	13.8
50 - 99 employees	101	6.5	222.5	12.5	437.4	13.0
100 - 249 employees	75	4.8	453.5	25.5	918.1	27.2
250 - 499 employees	32	2.1	458.2	25.8	788.8	23.4
500 or more employees	6	0.4	224.6	12.6	412.0	12.2
Motorcycle/bicycle/parts						
industry --	273	100.0%	402.5	100.0%	1,341.1	100.0%
By establishment (plant) size:						
Under 20 employees	206	75.5	35.1	8.8	73.5	5.5
20 - 49 employees	37	13.6	24.6	6.1	60.4	4.5
50 - 99 employees	12	4.4	27.8	6.9	60.1	4.5
100 - 249 employees	9	3.3	96.6	24.0	354.8	26.5
250 or more employees	9	3.3	218.4	54.3	792.3	59.1

Source: U.S. Bureau of the Census,
1982 Census of Manufactures, MC82-I-37C; MC82-I-39B

GENERAL INDUSTRY STATISTICS

Leading Manufacturers

The Fairchild Publications trade publication, SportStyle, compiles an annual list of the top companies in the business (The SportStyle 50). The listing for 1985 started with a volume of $43 million, while the lowest figure in the 1981 compilation was $24 million, reflecting the ability of large companies in the sporting goods and apparel industry to successfully compete in an increasingly difficult market.

The Top 50 Manufacturing Companies based on U.S. Sales, 1984

Rank	Company	$ Mil.
1	Nike	$765
2	AMF (sports products and bowling)	388.7
3	Russell Corp.	353
4	General Mills (Izod, Foot Joy)	313
5	Coleman	307
6	Adidas	290
7	Tultex	286
8	Ocean Pacific	279
9	Fuqua Industries (sporting goods)	247.6
10	Converse	244
11	Bassett Walker	240
12	Spalding (incl. license revenues)	223.4
13	Jantzen (incl. Jansport)	220
14	Wilson	218
15	Diversified Products	200
16	Puma	172
17	Pannill	170
18	Stride Rite Corp.	161.5
19	Pony	140
20	Woolrich	132
21	Figgie International	125
22	Colgate-Palmolive	124
23	Acushnet	123
24	Catalina	122
25	Champion	112
26	Bata	110
27	Adams-Milis	100
28	Warnaco Northwest Div. (Speedo, White Stag)	90
29	Hang Ten (incl. International)	90
30	Weider Health & Fitness (total sales)	88
31	Kangaroos	77
32	Pacific Trails	76
33	Danskin	75
34	New Balance	72
35	Timberland	72
36	Merona	68.4
37	Salomon	68
38	MacGregor	68
39	Reebok	65
40	Jockey (active sales only)	60

(continued)

GENERAL INDUSTRY STATISTICS

Leading Manufacturers

The Top 50 Manufacturing Companies based on U.S. Sales, 1984
(continued)

Rank	Company	$ Mil.
41	Vitamaster	60
42	Kellwood Corp. (Kelty, Wenzel)	60
43	Kayser Roth (Burlington, Interwoven)	58
44	Hyde	51
45	Kransco	50
46	Capezio	50
47	Rockport	46
48	Prince	46
49	The North Face	45
50	Penn Athletic	42.5

Source: SportStyle, June 17, 1985

The top five manufacturers listed below have been taken from a more detailed list compiled by SportStyle, covering 1983 and 1984 sales. Sources are market estimates or statements from corporate officers. (Dollar figures are in millions).

RUGGED FOOTWEAR	1984	1983
Timberland	$ 72	$ 60
Rockport	46	30
Herman's	36.5	35
Wolverine	35	33
Dunham	26	23.5

ATHLETIC FOOTWEAR	1984	1983
Nike	$620	$636
Converse	234	205
Adidas	185	210
Puma	125	125
Pony	125	114

HOME EXERCISE EQUIPMENT	1984	1983
Diversified Products	$200	$120
Ajay	80	56
VitaMaster	60	40
Weider	50	37.2
Precor	29	16.5

ATHLETIC SOCKS	1984	1983
Adams Millis	$100	$ 45
Burlington	37	37
Russell National	36.4	34
Wigwam	24	22
Interwoven	21	21

ATHLETIC FOOTWEAR/APPAREL	1984	1983
Nike	$145	$108
Adidas	105	140
Puma	47	43
Pony	15	na
New Balance	10	10

CYCLING/TRIATHLON APPAREL	1984	1983
Descente	$1.7	$0.25
Bellwether	1.5	0.8
Vigorelli	0.75	0.36
Le Coq Sportiff	0.6	0.85
Alitta	0.6	0.1

(continued)

GENERAL INDUSTRY STATISTICS

BODYWEAR

	1984	1983
Danskin	$ 75	$110
Capezio	50	50
Flexatard	20	19
Carushka	12	10
Tickets	9	6

ALPINE SKIS

	1984	1983
Rossignol	$26.8	$26
K2	18.1	13.9
Olin	17	15
Dynastar	15.6	14.5
Elan	11.7	8.7

ALPINE BINDINGS

	1984	1983
Salomon	$30.5	$25
Tyrolia	23.6	17.3
Look	10.5	8.2
Market Geze	4.5	4.5
Geze	4.3	3.8

TEAM APPAREL

	1984	1983
Russell Athletics	$118	$105
Champion	112	103
Bike	61	58.2
Delong	26	22.5
MacGregor SandKnit	23	17

TENNIS AND GOLF APPAREL

	1984	1983
Jantzen	$40	$33.6
Jockey	37	30
Catalina	36.5	37
Munsingwear	22.5	30
Tail/TFM	16.8	13.7

GOLF EQUIPMENT

	1984	1983
Acushnet	$123	$113
Spalding	80	72
Wilson	78	92.6
AMF/Ben Hogan	50	40
Ram	40	40

WARMUPS

	1984	1983
Tultex	$286	$288
Bassett Walker	240	222
Pannill	170	160
Russell Knit Apparel	168	150
Stone Manufacturing	35	31

SKI APPAREL

	1984	1983
CB Sports	$23	$21.5
Roffee	21.5	20
Sport Obermeyer	21	21
White Stag	17.1	15.5
Head Sportswear	14	13

ALPINE BOOTS

	1984	1983
Nordica	$30	$28
Salomon	28.8	19.1
Raichle	17	11.2
Lange	16.1	19
Technica	6.2	5

CROSS COUNTRY SKIS

	1984	1983
Trak	$10.9	$10.1
Salomon	5.1	4.6
Fischer	3.5	2.75
Karhu	3.5	2.3
Jarvinen	3.4	na

TEAM EQUIPMENT

	1984	1983
Wilson	$65.9	$61.7
Rawlings	61	58.5
MacGregor	45	32
Worth	30	26.5
Spalding	21	21

TENNIS EQUIPMENT

	1984	1983
Wilson	$57	$70
Penn Athletic	42.5	39
Prince	38	37
AMF/Head	20	20
Pro Kennex	11	10

ACTIVE SPORTSWEAR

	1984	1983
Izod-Lacoste	$300	$360
Jantzen	90	75.2
Merona	68.4	55
Catalina	55	46
Duffel	12.4	11.4

RUNNINGWEAR

	1984	1983
Dolfin	$11.5	$12.5
Bill Rodgers & Co.	9.1	8.5
Moss Brown & Co.	8.5	7.5
Sub-4	7.6	8.7
Hind	5.0	na

GENERAL INDUSTRY STATISTICS

BEACHWEAR	1984	1983
Ocean Pacific	$279	$242
Hang Ten	90	90
Hobie Sportswear	35	30
Gotcha	20	15
Laguna	20	20

JUNIOR SPORTSWEAR	1984	1983
Sassafrass	$27	$27
OP Juniors	19.7	14.2
Catalina Juniors	12	11
Sunset Beach	10	9
Daffy	7	6

RUGGED OUTERWEAR	1984	1983
Woolrich	$132	$120
Pacific Trail	71	71
Jansport	20	20
Patagonia	16	15
AFRC	14.6	14.5

WATERSPORTS EQUIPMENT	1984	1983
Hobie Cat/O'brien	$50	$40
Kransco	50	50
O'Neill	24	20
Connelly	10.5	8
Mistral	9.9	5

COMPETITIVE SPORTSWEAR	1984	1983
Speedo	$38.5	$34.0
Arena	13	11.5
The Finals	6.4	6.4
Hind	3	2
Gulbenkian	3	na

OUTDOOR EQUIPMENT	1984	1983
The Coleman Co.	$156	$144
Kellwood Corp.	60	60
Johnson Camping	25	25
Henderson Camping Prod.	24	24
The North Face	20	19.5

na not available

Source: SportStyle, June 17, 1985

Operating Results

Between 1978 and 1982, when shipments of athletic and sporting goods declined at an annual rate of 0.3%, several firms stopped producing sporting goods. Others, in response to high interest rates and the 1980-1982 recession, shut down unprofitable factories and consolidated manufacturing facilities. Results of this cost-cutting were noticeable in 1983. A Value Line Investment Survey covering a broad-based "recreation industry" showed a 19% gain in earnings on increased sales of only 1%.

The annual Sporting Goods Manufacturers Association Industry Financial Performance Study, covering sporting goods companies including manufacturers of apparel and footwear, also showed an upturn in profitability and in sales in 1983. Both turned down in 1984, however. A preliminary report by the SGMA indicates a continued decline in sales growth rate and profitability in 1985, while 1986 is seen as flat as ever.

The 1985 preliminary report covered 63 private and public companies in the industry. The median gain in sales reported for 1985 was 6.3%, and return-on-sales (after tax) was 2.9%. In the 1984 SGMA survey, sales growth was 13% and return-on-sales (after tax) declined to 4.1%.

As of May 1986, the SGMA looked for a typical 6.5% sales growth rate among the companies included in their surveys, with profitability at about 3.7%. However, the industry is expected to do better in 1987, as 'Olympic hype' begins.

GENERAL INDUSTRY STATISTICS

Plant Capacity Utilization

For the fourth quarter of 1984, plants in the sporting/athletic goods industry in the U.S. operated at 70% of the industry's preferred rate, compared with an operating rate of 86% of the preferred level in the fourth quarter of 1983. (The preferred level is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to costs or other considerations.) The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates: Fourth Quarters 1981-1984

	1984	1983	1982	1981
Sporting/athletic goods industry	70	86	76	91
Motorcycle/bicycle/parts industry	nr	76	63	61

nr not reported

Source: U.S. Bureau of the Census, Current Industrial Reports: Survey of Plant Capacity, 1984 (MQ-C1(84)1

REGIONAL INFORMATION

The sporting/athletic goods industry is not highly concentrated on a regional basis. However, the State of California accounted for 15.4% of value added by manufacture and 16.2% of industry shipments, according to the 1982 census of manufactures, making this the leading state. The U.S. motorcycle/bicycle/parts industry is highly concentrated among few manufacturers, and information on a state level is withheld by the Census Bureau to avoid disclosure of individual operations. Ohio and Tennessee both have large plants in this industry.

Leading States Shipping Sporting/Athletic Goods, 1982

	Establishments (Plants)		Value added by Manufacture		Value of Shipments	
	Total	With 20+ Employees	Mil. $	Percent	Mil. $	Percent
U.S. Total	1,553	460	$1,778.0	100.0%	$3,376.8	100.0%
California	284	85	274.5	15.4	548.7	16.2
Illinois	70	27	97.3	5.5	194.5	5.8
New York	69	24	89.2	5.0	174.4	5.2
Michigan	66	20	68.8	3.9	147.3	4.4
Pennsylvania	56	15	71.1	4.0	145.6	4.3
Wisconsin	70	22	52.8	3.0	110.0	3.3
Florida	88	26	45.7	2.6	98.7	2.9
Washington	65	22	57.0	3.2	97.9	2.9
Minnesota	49	13	30.5	1.7	54.4	1.6

Note: Texas has 88 plants in this industry (26 with 20 or more employees); however, value of shipment and value added by manufacture were not reported.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures (MC82-I-37C)

PRODUCT SHIPMENTS

In contrast with "industry shipments", which have been covered in data on GENERAL INDUSTRY STATISTICS, and defined on page 4, product shipments cover specific products made by both primary producers (classified within the industry) and secondary producers (classified in other, unrelated industries).

Trends in the value of product shipments have been compiled by the International Trade Administration, U.S. Department of Commerce. In terms of a constant (1982 dollar), which eliminates the effects of inflation, the ITA reported that the value of shipments of athletic and sporting goods of all kinds registered a sharp gain of 11.9% in 1984 compared with 1983, following a decline of 2.2% in 1983 compared with 1982. Sales have slowed down, however. In 1985, according to this source, the "real" gain in value of shipments was 2.4%; for 1986, the ITA forecasts a gain of only 1.0%.

On a constant dollar basis, the value of shipments of bicycles and parts by all producers gained 7.7% in 1984 compared with 1983, but registered a decline of 0.5% the following year. For the year 1986, the ITA anticipated a slight (1.1%) pickup in value of shipments.

Recent Performance & Forecast: Shipments of Sporting/Athletic Goods, Bicycles, Motorcycles, Parts

	Millions of Dollars				% Change			
	1983	1984	1985(e)	1986(f)	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting and athletic goods								
Value of shipments:								
Current dollars	$3,127	$3,477	$3,535	nr	-1.1%	+11.2%	+1.7	—
Constant 1982 $	3,091	3,460	3,542	$3,577	-2.2	+11.9	+2.4	+1.0
Bicycles & parts								
Value of shipments:								
Current dollars	596	642	629	—	-1.0	- 4.0	-2.0	—
Constant 1982 $	601	647	644	651	+0.2	+ 7.7	-0.5	+1.1

nr not reported

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

The 1983 figures on value of product shipments, included in the above table, are from the 1983 Survey of Manufacturers, conducted by the Census Bureau. This report provides further detail, as shown below, on products shipped in 1983, compared with the value reported in the 1982 census of manufactures.

PRODUCT SHIPMENTS

Value of Shipments of Specified Sporting/Athletic Goods, 1982, 1983
(Millions of dollars)

	1983	1982	% Change 1983/1982
Sporting and athletic goods	$3,126.7	$3,160.8	- 1.1%
Fishing tackle and equipment	331.6	341.9	- 3.0
Golf equipment	655.5	644.0	+ 1.8
Playground, gym, exercise equipment	678.2	531.4	+27.6
Other sporting goods, n.e.c.	1,158.7	1,314.1	-11.8
Sporting and athletic goods, n.e.c., n.s.k.	302.6	329.4	- 8.1

n.e.c. not elsewhere classified
n.s.k. not specified by kind

Source: U.S. Bureau of the Census,
1983 Annual Survey of Manufactures:
Value of Product Shipments M83(AS)-2

The census of manufactures covering all U.S. manufacturers with payroll provides the greatest detail available on shipments of specific products. The most recent census (which is undertaken by the U.S. Census Bureau every five years) covers operations in the year 1982. Findings in this census are compared with results in 1977 in the following tables.

Quantity of Shipments of Specified Sporting & Athletic Goods By All Producers, 1977, 1982
(Thousands of units, unless specified)

	1982	1977	% Change 1982/1977
Fishing rods	6,946.7	8,052.0	- 13.7%
Fishing reels	4,346.4	11,055.0	- 60.7
Fishing rod & reel combinations	5,429.3	na	na
Golf balls (1,000 doz.)	24,062.9	16,797.0	+ 43.3
Golf clubs:			
Irons	8,043.9	10,125.0	- 20.6
Woods	3,716.7	4,032.0	- 7.8
Golf bags	1,076.9	1,432.0	- 24.8
Baseball mitts & gloves	64.5	52.0	+ 24.0
Baseball bats	378.4	553.0	- 31.6
Exercise cycles	1,353.4	na	na

(continued)

Quantity of Shipments of Specified Sporting & Athletic Goods By All Producers, 1977, 1982

(Thousands of units, unless specified)
(continued)

	1982	1977	% Change 1982/1977
Footballs (1,000 doz.)	362.8	400.0	- 9.3%
Soccer balls (1,000 doz.)	49.8	na	--
Bowling balls (1,000 doz.)	1,853.5	2,599.0	- 28.7
Inflatable athletic balls (other than footballs, soccerballs, etc.)(1,000 doz.)	561.6	na	--
Tennis rackets (strung & unstrung)	2,951.6	3,409.0	- 3.2
Ice skates	457.8	1,484.0	- 69.2
Water skis	417.4	559.0	- 25.3

na not available

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series, MC-82-1-39B

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)

	1982	1977	% Change 1982/1977	% of Total 1982
Sporting and athletic goods, total	$3,160.8	$2,216.9	+ 42.6%	100.0%
Fishing tackle & equipment	341.9	270.1	+ 26.6	10.8
Glass fishing rods	33.2	48.2	- 12.7	1.3
Graphite metal fishing rods	8.9			
Other fishing rods	2.2	3.8	- 42.1	0.1
Fishing reels	58.2	63.4	- 8.2	1.8
Fish hooks, including snelled	24.4	15.3	+ 59.5	0.8
Casting plugs, spinners & spoons, flies, lures & similar artificial baits	67.7	49.2	+ 37.6	2.1
Tackle boxes	33.5	25.3	+ 32.4	1.1
Fishing rod & reel combinations	59.6	64.6	+ 76.0	3.6
All other fishing equipment	54.1			

(continued)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Golf equipment	$ 644.0	$ 385.1	+67.2%	20.3%
Golf balls	199.8	106.3	+88.0	6.3
Golf clubs:				
Irons	156.5	118.3	+32.3	5.0
Woods	125.8	63.1	+99.4	4.0
Golf bags	41.1	33.1	+24.2	1.3
All other golf equipment	120.8	64.2	+88.2	3.8
Playground, gymnasium & gymnastic equipment	531.4	257.8	+106.1	16.8
Home playground equipment, incl. swing sets, slides, seesaws, sandboxes, etc.	85.3	57.2	+49.1	2.7
Institutional playground equipment, incl. swing sets, slides, seesaws, etc.	58.7	35.3	+66.3	1.9
Gymnasium & gymnastic apparatus & equipment	53.3	56.7	- 6.0	1.7
Health, physical fitness & exercise equipment	123.3	98.6	+237.3	4.0
Weight lifting equipment	126.2			
Exercise cycles	83.1			
Playground, gymnasium & gymnastic equipment, n.s.k.	1.4	9.9	-85.9	0.1
Other sporting & athletic goods	1,314.1	1,060.8	+23.9	41.6
Billiard & pool tables	55.6	52.9	+ 5.1	1.8
Billiard & pool supplies	9.8	6.8	+50.8	0.3
Bowling alleys & bowling pin setters	16.3	1.5*	na	0.5
Bowling alley playing supplies:				
Bowling balls	36.7	34.6	+ 6.1	1.2
Other bowling alley supplies	81.0	66.1	+22.5	2.6
Baseballs	21.1	11.7	-12.1	0.7
Softballs		12.3		
Baseball mitts & gloves	17.6	12.2	+44.3	0.6
Baseball bats, incl. softball:				
Wood	30.3	10.5	+28.9	1.0
Metal		13.0		
Soccer balls	2.5	**	na	0.1
Footballs	24.2	21.7	+11.5	0.8
Basketballs	14.3	30.7	-53.4	0.5
Inflatable athletic balls other than basketballs & footballs	7.8	19.0	-58.9	0.2

(continued)

Value of Shipments of Specified Types of Sporting & Athletic Goods, By All Producers, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977	% of Total 1982
Other sporting & athletic goods (continued)				
Shoe & rink roller skates	$ 57.0	$ 40.2	+41.8%	1.8%
Wooden & plastic skateboards, incl. complete sets	3.7	49.5	-92.5	0.1
Ice skates	13.6	21.4	-36.4	0.4
Snow skis	37.5	42.5	-11.8	1.2
All other winter sports equipment	23.1	35.8	-35.5	0.7
Surfboards	2.3	20.2	+71.3	0.1
Water skis	32.3	--	--	1.0
Underwater sports equipment & sail boards	83.7	36.8	+127.4	2.6
Lawn tennis equipment:				
Rackets, all types	112.7	52.6	+114.3	3.6
Tennis balls All other tennis equip. & accessories	91.9	63.1 19.4	11.4	2.9
Racquetball rackets	30.9	***	na	1.0
Archery equipment	73.2	63.7	+14.9	2.3
Football protective equipment	20.7	29.8	-30.5	0.7
Football, baseball & soccer equip., n.e.c.	47.5	15.8	+200.6	1.5
Wading & above ground pools, under 15 ft. in diameter, not filtered, including plastics & metal	71.7	13.4	+435.1	2.3
Above ground swimming pools, 15 ft. in diameter, filter & over (completely manufactured)	37.2	46.3	-19.7	1.2
Other sporting & athletic equipment	222.4	191.3	+16.3	7.0

n.s.k. not specified by kind
n.e.c. not elsewhere classified
na not available
* did not include pin setters in 1977
** included in inflatable athletic balls in 1977
*** included in other sporting & athletic equipment in 1977

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series MC82-I-39B

PRODUCTION/SHIPMENTS

Bicycles, Motorcycles, Mopeds

Quantity & Value of Shipments of Motorcycles, Bicycles & Parts, 1977, 1982

(Quantity in thousands; value in millions of dollars)

	Quantity		Value	
	1982	1977	1982	1977
Motorcycles, bicycles, parts, total	--	--	$1,143.1	$ 847.3
Bicycles, adult tricylces, unicycles; children's 2-wheel sidewalk cycles	--	--	601.6	490.4
Bicycles, complete, with 1 or both wheels 25 inches or more				
Single speed	347.9	834.1	23.5	38.3
Three speed	608.8	744.7	43.3	40.9
Five speed	*	105.7	*	8.7
Ten speed	1,189.3	2,102.8	160.8	153.2
Over ten speed	389.1		41.7	
Bicycles, complete with both wheels less than 25 inches	2,779.2	3,411.4	206.1	152.7
Other, incl. unicycles & adult tricycles	74.1	150.9	21.1	12.0
Bike parts & type not specified	--	--	105.0	84.5
Motorcycles, motorbikes, mopeds, scooters, trail vehicles & parts	--	--	480.8	286.1
Type not specified	--	--	60.8	70.7

* Combined with data on over-10-speed

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC82-1-37C-4

Concentration of Product Shipments

Share of Specified Sporting Goods Shipments Accounted For By The Largest U.S. Manufacturers, 1977, 1982

	Value (Mil. $)	% of Value Accounted For By Largest Companies			
		Top 4	Top 8	Top 20	Top 50
Sporting and athletic goods					
1982	$3,160.8	15%	26%	41%	59%
1977	2,216.9	18	26	39	54
Fishing tackle, equipment					
1982	341.9	37	55	71	85
1977	270.1	29	41	64	83
Golf equipment					
1982	644.0	44	62	89	98
1977	385.1	42	62	88	98
Playground, gym, exercise equipment					
1982	531.4	33	48	75	93
1977	257.8	31	47	73	93
Bicycles and parts					
1982	601.6	72	85	96	100
1977	490.4	76	92	99	100

Source: U.S. Bureau of the Census, 1982 Census of Manufactures: Concentration Ratios in Manufacturing, Subject Series MC82-S-7

PRODUCTION/SHIPMENTS

Activewear

The growing number of women participating in active sports and fitness activities, as well as the popularity of the "look" provided by activewear, regardless of end-use, has led to sharp increases in production of some items, particularly "sweats". The following table summarizes information on U.S. production of types of activewear for men and for women which are designed primarily for active sports participation -- although many purchasers may use them only for leisure/street wear.

Production & Value of shipments of Specified Active Sportswear, 1983, 1984
(Quality in 1,000 dozens; value in millions of dollars)

	Quantity			Value		
	1984	1983	1984/83	1984	1983	1984/83
Men's & boys':						
Athletic shorts, incl,. jogging shorts & tennis shorts	4,773	5,586	- 14.6%	216.8	227.7	- 4.8%
Sweat shirts	6,722	6,194	+ 8.5	348.6	345.2	+ 1.0
Sweat pants	2,496	2,156	+ 15.8	166.0	144.1	+15.2
Warm-up or jogging suits	1,490	1,332	+ 11.9	111.7	108.6	+ 2.9
Swimwear, total (fashion & competitive)	1,668	1,573	+ 6.0	110.5	103.1	+ 7.2
Woven	1,248	1,094	+ 14.1	na	na	--
Knit	185	216	- 14.4	na	na	--
Not specified	235	263	- 10.6	na	na	--
Team sports uniforms, total	987	1,195	- 17.4	70.0	81.1	- 13.7
Softball & baseball	391	476	- 17.9	32.0	36.4	- 12.1
Football	276	346	- 20.0	18.2	22.5	- 19.1
Basketball	280	315	- 11.1	16.8	18.8	- 10.6
Other	40	58	- 31.0	3.0	3.4	- 11.8
Ski jackets, including vests	82	108	- 24.1	40.4	51.4	- 21.4
Ski pants	13	16	- 18.8	8.0	8.9	- 10.1
Women's, misses' & juniors':						
Athletic shorts, including jogging shorts, tennis skirts, etc.	3,164	3,254	- 2.8	218.0	188.7	+ 15.5
Sweat pants	761	146	+421.2	44.6	12.0	+271.7
Sweat shirts	1,489	887	+ 67.9	86.1	54.0	+ 59.4
Body suits and body shirts	354	na	--	45.7	na	--
Warm-up jogging suits	851	1,908	- 55.4	84.5	143.3	- 41.0
Swimsuits, total (fashion & competitive)	3,170	2,893	+ 9.6	418.7	390.9	+ 7.1
Woven	552	589	- 6.3	na	na	--
Knit	2,175	1,896	+ 14.7	na	na	--
Not specified	443	408	+ 8.6	na	na	--
Ski jackets, including vests	46	50	- 8.0	27.4	29.6	- 7.4
Ski pants	12	14	- 14.3	7.6	7.9	- 3.8
Team sports uniforms	499	537	- 7.1	37.0	32.3	+ 14.6

na not available

Source: U.S. Bureau of the Census, Current Industrial Reports (MA-23E & F(84)

PRODUCTION/SHIPMENTS

Athletic Footwear

Two distinct classifications of the U.S. footwear industry are involved in athletic footwear: types with rubber or plastic soles vulcanized to fabric uppers (such as tennis shoes and various types of athletic and leisure shoes) and nonrubber footwear (which includes jogging and running shoes, golf shoes, rubber-soled shoes with leather or plastic uppers, etc.)

The narrow definition of athletic footwear which applied mainly to very functional athletic footwear in past years has been broadened greatly to encompass a much larger classification -- "athleisure" footwear. These shoes have a "sporty" look and can be worn not only for active sports but for aerobics, leisure or street wear.

There has been a sharp downturn in U.S. production and shipments of rubber/plastics footwear for the past 13 years, and this trend is expected to continue. In the latest annual Census Burau report, covering 1984, production of shoes with rubber or plastic soles and fabric uppers totaled 64,510,000 pairs, which was 17% below the 1983 total. Imports now account for over 60% of the U.S. market. Domestic manufacturers are trying to adapt by concentrating on specialized footwear types in which they can be competitive, by diversifying, and by importing to fill out lines.

In general, the market for athletic footwear has been turned upside down by the growing participation of women in active sports and fitness activities. This has brought about rapid style and fashion changes, and made the market very unpredictable. The styling of "athleisure" footwear types shifted suddenly away from the athletic look toward more functional walking and aerobic types. The distribution pipeline clogged, and inventories showed a massive buildup by mid-1985. Preliminary figures for 1985, issued by the Census Bureau, showed U.S. production of nonrubber athletic footwear at only 7,268,000 pairs compared with 13,980,000 in 1984. Within the footwear industry, U.S. makers of nonrubber athletic footwear had the lowest capacity utilization rate (56%).

A bright spot for U.S. manufacturers has been an increase in exports of athletic footwear. In the first half of 1985, footwear exports to Japan, alone, were up 37%, and most of this was athletic footwear. American sport shoe crazes sparked by basketball and aerobics are helping U.S. footwear manufacturers in Europe, where it is estimated they now have a 30% market. Pony, Sport and Leisure are also reported to be restructuring their European operations. The trend is for large U.S. footwear firms to set up wholly-owned subsidiaries to produce and sell abroad.

Early in 1986, six of the largest U.S. athletic footwear and apparel companies formed a new international athletic trade association, the International Athletic Footwear & Apparel Manufacturers' Association (IAFAMA), to further their common interests.

According to the Sporting Goods Manufacturers Association (SGMA), in the fourth quarter of 1985, shipments of athletic shoes in the U.S. totaled 17.4 million and of that total Nike shipped 25.9%, followed by Reebok (which is coming up fast), 13.2%; and by Converse, 6.1%. Shipments of the leaders by type of shoe were reported as follows:

Basketball		Running		Aerobic	
Nike	46.3%	Nike	33.2%	Reebok	58.2%
Converse	17.6	New Balance	8.8	Nike	7.7
Pony	5.9	Adidas	6.6	Pony	4.4
				Avia	3.7

Athletic Footwear (continued)

Concentration of Shipments

In the nonrubber athletic footwear industry, the Census Bureau's 1982 census counted 30 companies with annual shipments of $100,000 or more. (Total product shipments were valued at $219.3 and 16.6 million pairs were shipped.) the share of shipments accounted for by the largest companies in a general category, of which 85% was nonrubber athletic footwear showed the 20 largest companies accounting for 86% of shipments; the eight largest, 53%; the four largest, 32%.

Shipments of rubber/plastic footwear, including tennis shoes, running, basketball, etc., were reported at $536.1 million in 1982. There were 36 companies in the industry with shipments valued at $100,000 or more, but the 20 largest companies accounted for 96% of shipments. The eight largest accounted for 70%; the four largest 45%.

The Census Bureau changed the system in reporting on production of non-rubber athletic footwear by type in 1984. However, as previously noted, the total declined 24% from 18,307,000 pairs in 1983 to 13,980,000 in 1984. About 41% of 1984 production were of shoes with plastic (vinyl) uppers, 54% had leather uppers, about 5% had uppers of other materials.

Production of Non-rubber Athletic Shoes for Men, Women & Children, 1984
(Thousands of pairs)

	Total	% of Total
Athletic shoes, total	13,980	100.0%
By type:		
Court shoes	1,762	12.6
Running or jogging shoes	3,884	27.8
Cleated shoes, except golf shoes	125	8.9
All other	8,290	59.3
By sex:		
Men's	3,730	26.7
Women's	2,559	18.3
Children's	7,691	55.0
By material:		
Leather uppers	7,498	53.6
Plastic (vinyl) uppers	5,723	40.9
All other materials	759	5.5

Source: U.S. Bureau of the Census, Current Industrial Reports: Footwear MA31A(84)-1

PRODUCTION/SHIPMENTS

Quantity & Value of Shipments of Non-rubber Athletic Footwear, 1983, 1984
(Quality in 1,000 pairs; value in millions of dollars)

	Quantity		% Change	Value		% Change
	1984	1983	1984/83	1984	1983	1984/83
Athletic footwear (men's women's & children's)	14,120	17,265	-18.2%	$206,188	$233,910	-11.9%

Source: U.S. Bureau of the Census, Current Industrial Reports Footwear MA31A(84)-1

PRODUCER PRICES

Producer (Factory) Price Indexes For Specified Types of Sporting Goods & Activewear, 1984, 1985 Annual Averages
(1967=100, unless otherwise noted)

	Annual Average		% Change
	1985	1984	1985/84
Athletic footwear (June 1980=100)	104.9	104.1	+ 0.8%
Designed for sports	117.1	115.3	+ 1.6
Sporting and athletic goods	204.1	205.3	- 0.6
Baseball gloves	202.8	209.4	- 3.2
Footballs	203.7	208.6	- 2.3
Bowling balls	186.2	181.4	+ 2.6
Bicycles (Dec. '84=100)	98.0	na	--

na not available

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

The growth in imports of sporting/athletic goods, and related products, has been a major factor in the slowdown in the U.S. industry. Imports of sporting goods increased nearly 10% in 1985, according to the Census Bureau, reaching an estimated $1.2 billion, and representing 27% of total domestic consumption compared with 15% in 1972. As previously noted, the impact of imports on the athletic footwear industry has been even greater.

FOREIGN TRADE

In addition to Japan, the majority of U.S. imports come from developing countries, where labor costs are much lower than in the U.S. The leading suppliers for sporting goods in 1985 were Taiwan, South Korea, and Japan. Taiwan, South Korea, and other developing countries benefit from the special provisions of the Generalized System of Preferences, Trade Act of 1974, which provides duty-free treatment for eligible items. The sharp increase in the value of the dollar -- turned around somewhat this year -- has been an aid to foreign suppliers, making their products less expensive in the U.S. U.S. tariff rates have also been reduced.

Exports of sporting goods, on the other hand, declined in 1985 by about 6%, but may be helped this year by a weaker dollar. The value of exports in 1985 was reported at about $300 million. Developed countries are the best markets for U.S. sporting/athletic goods -- including Japan, Canada, and the United Kingdom. Exports represented 8.8% of U.S. manufacturers shipments in 1985, down from 12.3% in 1982.

Adversely affecting U.S. exports are the quotas instituted by the European Economic Community on gymnastic equipment and snow skis, which were issued in retaliation for U.S. quotas on specialty steel imports. The strong U.S. dollar, which made U.S.-made products expensive for foreign buyers, has been another factor working against exports.

Trends & Outlook For Foreign Trade in Sporting/Athletic Goods & Bicycles

	Millions of Dollars				% Change			
	1983	1984	1985(e)	1986(f)	1983/ 1982	1984/ 1983	1985/ 1984	1986/ 1985
Sporting and athletic goods								
Value of imports	$ 828	$1,091	$1,190	$1,260	+19.1	+31.8	+ 9.1	+ 5.9
Import/new supply ratio*	0.209	0.239	0.252	—	+16.1	+14.1	+ 5.5	—
Value of exports	$ 366	$ 332	$ 312	$ 320	- 5.6	- 9.4	- 5.9	+ 2.6
Export/shipment ratio*	0.17	0.095	0.088	—	- 4.6	-18.5	- 7.5	—
Bicycles & parts								
Value of imports	$ 329	431	440	nr	+ 58.1	+30.8	+ 2.1	—
Import/new supply ratio*	0.330	0.402	0.411	nr	+ 28.4	+21.8	+ 2.2	—

* New supply is the sum of product shipments plus imports.
(e) estimated
(f) forecasted
nr not reported

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

FOREIGN TRADE

Imports

Monthly and annual compilations covering U.S. imports are provided by the U.S. Census Bureau. Summarizing the major classifications covered in these reports, the largest value of imports in the sporting goods field is in bicycles. These accounted for 25% of the total value reported for major classifications, followed by fishing equipment (15%).

Summary of Imports of Reported Sporting Goods Categories, 1984, 1985
(Millions of dollars)

	1985	1984	% Change 1985/1984
Reported sporting goods classifications, total	$1,558.8	$1,464.7	+ 6.4%
Fishing equipment	233.5	208.8	+ 11.8
Golf equipment	111.1	104.9	+ 5.9
Tennis equipment	75.5	94.0	- 19.7
Baseball equipment	120.9	115.1	+ 5.0
Athletic balls	72.1	64.7	+ 11.4
Skates (roller & ice)	37.6	37.5	+ 0.3
Ski equipment	117.9	111.3	+ 5.9
Bicycles	388.8	380.6	+ 2.1
All other categories	401.4	347.8	+ 15.4

Source: U.S. Census Bureau, U.S. General Imports, FT 135

Detailed information on imports of specific products within the above classifications were reported as shown in the following table covering 1984 and 1985.

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Bagatelle, billiard & pool equip. (exc. tables) & parts	$ 10.2	$ 8.7	+ 17.2%	—	—	—
Table tennis equip. (exc. tables) & parts	3.4	2.3	+ 3.0	—	—	—
Tables designed for games	6.2	2.1	+195.2	—	—	—

(continued)

FOREIGN TRADE

Imports (continued)

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985
(continued)

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Fishing equipment, total	233.5	208.8	+ 11.8	—	—	—
Snelled fish hooks	1.4	2.1	- 33.3	—	—	—
Fish hooks other than snelled	8.4	9.0	- 6.7	—	—	—
Artificial baits & flies	17.7	16.5	+ 7.3	100,351.5	103,070.1	- 2.6%
Fishing rods	75.0	64.2	+ 16.8	15,518.0	14,602.8	+ 6.3
Parts of fishing rods	4.1	5.5	- 25.5	—	—	—
Fishing reels	102.3	84.1	+ 21.6	15,228.7	11,782.3	+29.3
Parts of fishing reels	2.6	2.1	+ 23.8	—	—	—
Sport fishing tackle & equipment & parts, n.e.c.	22.0	25.3	- 13.0	—	—	—
Golf equip., total	111.1	104.9	+ 5.9	—	—	—
Golf balls	4.6	3.7	+ 24.3	11,567.9	8,853.7	+30.7
Golf clubs	17.3	13.2	+ 31.1	1,374.0	804.1	+70.9
Parts for golf clubs	43.9	43.5	+ 0.9	—	—	—
Golf gloves	32.3	33.9	- 4.7	11,750.5	12,466.1	- 5.7
Golf equip. & parts, n.e.c.	13.0	10.6	+ 22.6	—	—	—
Bicycles, having both wheels over 25 inches	252.0	235.0	+ 7.2	3,362.3	2,794.9	+20.3
Parts for bicycles, n.e.c.	136.8	145.6	- 6.0	—	—	—
Lawn tennis equip., total	75.5	94.0	- 19.7	—	—	—
Lawn tennis balls	1.2	2.0	- 40.0	2,137.2	4,872.7	-56.1
Lawn tennis racquets, strung or not strung	61.9	78.0	- 20.6	3,783.1	5,201.8	-27.3
Lawn tennis equip. & parts, n.e.c.	12.4	14.0	- 11.4	—	—	—
Baseball equip., total	120.9	115.1	+ 5.0	—	—	—
Baseballs & softballs	49.8	47.7	+ 4.4	30,834.7	31,752.9	- 2.9
Gloves & mitts for baseball & softball	54.7	50.5	+ 8.1	6,605.5	6,204.0	+ 6.5
Baseball equip. (exc. balls & gloves) & parts, n.e.c.	16.4	16.8	- 2.4	—	—	—
All other balls, total	72.1	64.7	+ 11.4	—	—	—
Basketballs	31.4	23.0	+ 36.5	7,698.5	5,567.8	+38.3
Footballs	5.0	3.5	+ 42.9	1,842.6	1,378.5	+33.7
Soccer & polo balls	12.3	17.2	- 28.5	3,345.8	4,244.4	-21.2
Bowling balls	—	—	—	0.9	0.6	+50.0
Balls for games & sports, n.e.c.	23.4	21.0	+ 11.4	—	—	—

(continued)

Imports (continued)

Imports of Specified Types of Sporting & Athletic Goods, 1984, 1985
(continued)

	Value (C.I.F.*) (Millions of Dollars)			Quantity (Thousands of Units)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Skates (roller & ice), total	$ 37.6	$ 37.5	+ 0.3%	—	—	—
Roller skates (incl. footwear with skates permanently attached) & parts	22.8	23.2	- 1.7	—	—	—
Ice skates permanently attached to footwear	13.1	12.5	+ 4.8	824.3	703.9	+ 17.1%
Ice skates not permanently attached to footwear	0.1	0.2	-50.0	5.7	23.5	- 75.7
Ice skate blades & other parts	1.6	1.6	—	—	—	—
Ski & allied equip., total	117.9	111.3	+ 5.9	—	—	—
Snow skis	54.5	50.1	+ 8.8	1,292.6	1,065.2	+ 21.3
Tobbogans	2.1	2.0	+ 5.0	422.9	301.7	+ 40.2
Ski equip. (water ski, bindings, poles, etc.) n.e.c.	61.3	59.2	+ 3.5	—	—	—
Hockey equip. (exc. skates) & parts	21.2	21.1	+ 0.5	—	—	—
Archery equip. & parts	4.2	3.0	+40.0	—	—	—
Playground, gymnasium, gymnastic & exercise equip., n.e.c.	188.6	135.4	+39.3	—	—	—
Badminton equip. & parts thereof	4.9	5.2	- 5.8	—	—	—
Game, sport, or athletic equip., n.e.c.	162.7	169.0	- 3.7	—	—	—

n.e.c. not elsewhere classified

* The C.I.F. value refers to the value of imports at the first port of entry in the U.S. It is based on the purchase price, including all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Note: Data on imports of activewear is not available separately from general-use apparel for the most part, and therefore not included in the above table. For athletic footwear, see the Fairchild Footwear Fact File.

Source: U.S. Bureau of the Census,
U.S. General Imports, (FT 135, December 1984, 1985).

AT THE RETAIL LEVEL

CONSUMER MARKETS

The Size of the Potential Market

Market prospects are enhanced by current demographic trends. The fastest growing segment of the population between 1985 and 2005 will be the 35 - 54 year old age group. This group is the most interested in sports participation, in fitness, and in fashionable sportswear and it is in its prime earning years, As this group grows, so are sales of sporting goods expected to grow.

Currently, the 35 - 54 year age group represents 22.7% of the U.S. population. By 2005, it is expected to grow to 29.9% of the total.

With the generally accepted income-sensitivity of the sporting goods market, the influx of women into the work force is also aiding the boost in sales. As more and more women join the labor force, the median household income has risen dramatically. With less free time, these women are buying more fitness equipment for home use.

U.S. Population 1985 & Projections - 1994*, 2005*

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Male							
Total, all ages	116,649	125,464	134,297	+ 15.1	100.0%	100.0%	100.0%
Under 5 years	9,230	9,635	8,931	- 3.2	7.9	7.7	6.6
5 to 9 years	8,608	9,866	9,094	+ 5.6	7.4	7.9	6.8
10 to 15 years	10,691	11,245	11,698	+ 9.4	9.2	9.0	8.7
16 years & over	88,119	94,718	104,574	+ 18.6	75.5	75.4	77.9
16 - 19	7,548	6,712	8,058	+ 6.8	6.5	5.3	6.0
20 - 34	31,918	29,725	27,416	- 14.1	27.4	23.7	20.4
35 - 54	26,671	35,187	40,769	+ 52.9	22.9	28.0	30.4
55 - 64	10,500	9,793	14,060	+ 33.9	9.0	7.8	10.5
65 & over	11,529	13,300	14,271	+ 23.8	9.9	10.6	10.6
Median age (years)	30.3	33.0	36.0	--	--	--	--
Female							
Total, all ages	122,634	132,251	141,381	+ 15.3	100.0	100.0	100.0
Under 5 years	8,806	9,188	8,518	- 3.3	7.2	6.9	6.0
5 to 9 years	8,213	9,415	8,678	+ 5.7	6.7	7.1	6.1
10 to 15 years	10,180	10,745	11,167	+ 9.7	8.3	8.1	7.9
16 years & over	95,434	102,903	113,018	+ 18.4	77.8	77.9	80.0
16 - 19	7,270	6,426	7,707	+ 6.0	5.9	4.9	5.5
20 - 34	31,562	29,068	26,706	- 22.7	25.7	22.0	18.9
35 - 54	27,765	36,202	41,249	+ 48.6	22.6	27.4	29.2
55 - 64	11,834	11,002	15,399	+ 30.1	9.6	8.3	10.9
65 & over	17,002	20,205	21,957	+ 29.1	13.9	15.3	15.5
Median age (years)	32.7	35.6	39.2	--	--	--	

(continued)

The Size of the Potential Market

U.S. Population 1985 & Projections - 1994*, 2005*
(continued)

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Total male & female							
Total, all ages	239,283	257,714	275,677	+ 15.2	100.0%	100.0%	100.0%
Under 5 years	18,037	18,823	17,449	+ 3.4	7.5	7.3	6.3
5 to 9 years	16,822	19,281	17,772	+ 5.6	7.1	7.5	6.5
10 to 15 years	20,872	21,991	22,865	+ 9.5	8.7	8.5	8.3
16 years & over	183,553	197,619	217,591	+ 18.5	76.7	76.7	78.9
16 - 19	14,818	13,138	15,765	+ 6.4	6.2	5.1	5.7
20 - 34	63,434	58,792	54,122	- 14.7	26.5	22.8	19.6
35 - 54	54,436	71,389	82,018	+ 50.7	22.7	27.7	29.7
55 - 64	22,334	20,793	29,459	+ 31.9	9.3	8.1	10.7
65 & over	28,530	33,507	36,227	+ 27.0	11.9	13.0	13.1
Median age (years)	31.2	34.3	37.6	--	--	--	--

* Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. Armed Forces overseas are included.

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census, Current Population Reports,
Series P-25, No. 952 (May 1984),
Series P-25, No. 985 (April 1986)

In addition to a favorable population/age mix, the amount of disposable income is a prime factor in determining the growth of the industry. According to a report issued by the U.S. Census Bureau and The Conference Board's Consumer Research Center, some 26.5 million households -- about one out of every three households -- have income above that required for a "comfortable" standard of living. The "discretionary income", which is the amount of money households have after paying taxes and normal household expenses, amounts to about $280 billion (measured in 1984 dollars). It represents 16% of all household income after taxes averaging about $10,530, based on the Census Bureau's May 1983 income survey.

With the continuing increase in the number of two-earner households, the amount of discretionary income will grow. These higher income households also tend to have more leisure time and will spend more on fitness, sporting goods and apparel.

Households With Spendable Discretionary Income
By Age of Household Head, 1983

	Number (thousands)	Percent	Spendable Discretionary Income Aggregate (billions)	Spendable Discretionary Income Average	Spendable Discretionary Income Per Capita
Total households	83,918	100.0			
With discretionary income	26,409	31.5	$ 277.9	$10,525	$3,713
Age of householder					
Under 25 years	1,195	21.0	7.7	6,444	2,833
25 to 29 years	2,472	26.1	18.9	7,654	2,867
30 to 34 years	3,355	34.8	30.3	9,021	2,799
35 to 39 years	2,650	30.2	26.8	10,127	2,964
40 to 44 years	2,579	35.5	29.9	11,606	3,056
45 to 49 years	2,224	36.1	26.0	11,674	3,384
50 to 54 years	2,336	37.7	29.2	12,479	4,017
55 to 59 years	2,672	40.7	34.1	12,766	4,889
60 to 64 years	2,180	33.5	25.1	11,506	4,923
65 years and over	4,748	26.9	50.0	10,531	5,633

Source: U.S. Bureau of the Census & The Conference Board
A Marketer's Guide to Discretionary Income (1985)

Sports Participation & Attendance

According to the latest in a series of studies covering participation of adults 18 years old and over in selected sports, conducted by the Gallup Organization, swimming is the number one sport. In the 1982 study, 37% of adults reported they had swum in the last twelve months.

The 1985 study reveals that fishing surpassed bicycling as the number two sport, with a 32% participation rate versus 31% for bicycling. In 1982, participation rates were 24% and 27%, respectively.

Gallup reports that between 1982 and 1985, thirteen sports recorded increases in participation, eight showed declines, three remained stable and one, running/jogging, was not measured in 1982.

Participation in Selected Sports 1982, 1985
(Percent of adults participating in past 12 months)

	1985	1982
Swimming	41%	37%
Fishing	32	24
Bicycling	31	27
Bowling	23	24
Running/jogging	23	na
Camping	22	19
Softball	20	16
Volleyball	15	13
Motorboating	15	12

(continued)

Sports Participation & Attendance

Participation in Selected Sports 1982, 1985
(Percent of adults participating in past 12 months)
(continued)

	1985	1982
Basketball	14%	18%
Hunting	13	13
Golf	12	8
Ping pong/table tennis	12	13
Tennis	12	14
Baseball	12	10
Canoeing/rowing	10	7
Flying disk (frisbee)	9	17
Rollerskating	9	12
Horseback riding	8	7
Skiing	7	6
Waterskiing	7	7
Sailing	5	4
Ice skating	5	7
Archery	3	3
Handball	3	4

Source: Gallup Organization, Inc. 1986

Following is a list of the top ten sports based on participation by men and by women as determined by a survey of adults 18 years old and over by the Gallup Organization in late 1985.

Participation in Specified Sports By Sex, 1985
(Percent participating in the past twelve months)

Men		Women	
	Percent		Percent
Swimming	42%	Swimming	40%
Fishing	41	Bicycling	33
Bicycling	29	Aerobics	31
Pool/billiards	27	Fishing	24
Weight training	26	Bowling	23
Jogging	25	Camping	21
Softball	25	Jogging	21
Camping	24	Hiking	18
Bowling	23	Softball	16
Basketball	22	Volleyball	14

Source: The Gallup Organization

CONSUMER MARKETS

Sports Participation & Attendance

Women are expected to be the major factor in the growth of the sports/fitness market as they actively participate in increasing numbers. While men still represent the largest number of active participants in most sports, growth in the market will be fueled by women, according to the National Sporting Goods Association (NSGA).

An NSGA survey showed that 88.5% of the 24.4 million people who participated in aerobics more than once were women. Of the new participants, 86.7% were women, while 13.3% were men. In running, of the 29.5 million who participated, 47.3% are women and 58.1% of new participants are female. In hiking, of 21.6 million participants, 50.4% were women and 46.7% of new participants were female.

Women are also entering competitive sports previously associated entirely with men at a high rate. Women make up 27.3% of the 21.2 million basketball participants and 38% of new participants were women. In softball, of 22.3 million participants, 39.3% were women and 46.2% of new participants were women. In racquetball, of 9.9 million participants, 33.3% were women and 43.9% of new participants were women. In soccer, of 9 million participants, 33.7% were women and 33.1% of new participants were women.

The influx of women is having a marked effect on retailing. Sporting goods stores have shifted their product mix to stay abreast of the changes. Twenty years ago a store had a product mix of 70% equipment and 30% shoes and clothing; today in many stores that ratio has been reversed. In 1980, only about 30% of athletic apparel was sold for women; in 1986 these sales accounted for 55%. Women currently buy an estimated 40% of all athletic shoes, according to industry sources, and more than 92% of aerobic shoes, 50% of running shoes.

Sport Attendance by Type of Sport, 1983 - 1985

	1985	1984	1983	% Change 1985/84	% Change 1985/83
Auto racing (e)	61,302,550	57,606,300	55,122,329	+ 6.4%	+ 11.2%
Thoroughbred racing	50,499,754	50,284,324	50,169,430	+ 0.4	+ 0.7
Major league baseball	46,838,819	44,742,863	45,540,338	+ 4.7	+ 2.9
College football	38,312,022	36,652,179	36,301,877	+ 4.5	+ 5.5
College basketball	32,056,673	31,684,078	31,471,135	+ 1.1	+ 1.9
Greyhound racing	23,966,739	22,283,902	22,090,018	+ 7.6	+ 8.5
Harness racing (e)	22,925,399	24,236,074	25,615,000	- 5.4	- 10.5
Minor league baseball	18,380,000	17,580,299	18,560,690	+ 4.5	- 1.0
Wrestling (e)	16,375,250	12,910,000	9,500,000	+26.8	+ 72.4
NFL Football	13,345,047	13,398,112	13,277,222	- 0.4	+ 0.5
NHL Hockey	12,741,230	12,466,786	12,028,832	+ 2.2	+ 5.9
College baseball	11,668,916	9,921,530	12,896,497	+17.6	- 9.5
NBA basketball	11,490,944	11,110,483	10,244,084	+ 3.4	+ 12.1
Minor league hockey*(e)	10,138,266	8,747,608	8,256,882	+15.9	+ 22.7

(e) estimated
* includes college hockey

Source: Daily Racing Forum
Survey of Sport Attendance 1983 - 1985

RETAIL SALES

Total retail sales of sporting goods, apparel and footwear are estimated to have reached about $24 billion in 1985, with apparel accounting for about $6 billion and footwear at about $2.5 billion. Estimates for 1986 are for the entire sporting goods and related products industry to remain at about the same level overall, with some segments showing increases while others show a decline.

RETAIL SALES BY STORE TYPE

The only official information on merchandise line sales in specific types of retail outlets is that made available every five years by the U.S. Bureau of the Census, based on a complete survey of all retail outlets with one or more paid employees. The most recent census, covering operations in 1982, has been released by the Bureau within the last year, and specialized reports are still scheduled for release by the Bureau.

Sales of sporting goods, as defined by the Census Bureau, include team goods sold to teams and institutions by retailers (as well as sales of team goods at retail), sports equipment (tennis, golf, ski, etc.), camping equipment, firearms, hunting equipment, trophies and plaques, bicycles, boats, and other sporting goods. Activewear is not included.

Total sales of this classification through retail outlets with payroll amounted to $13,038 million in 1982, representing a gain (in current dollars) of 38% compared with the 1977 total of $9,451 million.

A total of 70,468 retail establishments were included in the 1982 sales total. Comparable figures for 1977 are not available, however, due to a change in the treatment of leased departments, which particularly affected the counts on general sporting goods stores in 1982. In that year, the Census Bureau made a change in the treatment of leased departments. In earlier years, the data on leased departments was combined in data on the lessor stores; in 1982, however, leased departments were counted as separate retail establishments in their specific type of business. (See section on Sporting Goods Stores).

Sporting Goods & Related Product Sales By Major Type of Retail Outlet, 1982
(Establishments with payroll)

	Number of Establishments	Sales	
		Thous. $	Percent
Sporting goods & equipment, total	70,468	$13,038,094	100.0
General merchandise store group, total	14,615	2,859,631	21.9
Department stores	5,909	1,994,501	15.3
Variety stores	4,036	215,941	1.7
Misc. general merchandise stores	4,670	649,189	5.0
Boat, vehicle, automotive dealers	5,284	2,578,107	19.8
Sporting goods stores, total*	20,152	5,624,145	43.1
General line sporting goods stores	9,252	3,110,916	23.9
Specialty line sporting goods stores	10,900	2,513,229	19.3
Other retail (mail order house, hardware stores, hobby shops, etc.)	30,417	1,976,211	15.2

* Includes leased sporting goods departments operated in general merchandise stores as noted in introductory paragraph. (See section on Sporting Goods Stores)

Source: U.S. Bureau of the Census: 1982 Census of Retail Trade (RC82-1-3)

RETAIL SALES BY STORE TYPE

Activewear

Among the major store types for which sales of activewear were reported in the 1982 census of retail trade, sales amounted to over $4.9 billion. Of this total, activewear for men amounted to about $1.8 billion (with boys' included with men's sales in sporting goods stores) and for women, $3.0 billion (including girls' in sporting goods stores). Sales by major outlet type were reported as follows:

Activewear Sales By Type of Retail Outlet, 1982
(Sales in thousands of dollars)

	Total Reported		Men's		Women's	
	Sales	Percent	Sales	Percent	Sales	Percent
Activewear, total reported*	$4,846,772	100.0	$1,831,869	100.0	$3,014,903	100.0
Department stores	2,008,564	41.4	796,943	43.5	1,211,621	40.2
Apparel specialty stores:	1,901,059	39.2	491,229	26.8	1,409,827	46.7
Men's wear stores	186,023	3.8	174,505	9.5	11,518	0.4
Women's ready-to-wear stores	916,450	18.9	29,546	1.6	886,904	29.4
Women's accessory spec. stores	164,765	3.4	—	—	164,765	5.5
Family clothing stores	631,615	13.0	287,178	15.7	344,437	11.4
Children's wear stores	2,206	**	—	—	2,206	**
Sporting goods stores	937,149	19.4	543,679#	29.7	393,452##	13.1
General line	601,363	14.3	408,849	22.3	282,514	9.4
Specialty line	245,786	5.1	134,848	7.4	110,938	3.7

* Athletic footwear is not included
** Less than 0.1%
# Includes both men's and boys'
## Includes both women's and girls'

Source: Based on 1982 Census of Retail Trade reports.

Sporting Goods Stores

The 1982 census of retail trade counted 20,152 sporting goods stores with payroll in business anytime during the year, and a total of 18,590 in operation the entire year. The latter figure includes 8,709 general line sporting goods stores (46.8%) and 9,881 specialty sporting goods stores (53.2%). These two types are defined as follows:

General Line Sporting Goods Stores (SIC 5941): stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, skiing, riding, tennis, golf, etc. Also gym and fitness equipment.

Specialty Line Sporting Goods Stores (SIC 5941): stores specializing in a maximum of four lines of sporting goods and equipment, such as guns, bicycles, trophies, skiing equipment, golf equipment, etc.

The 20,152 sporting goods stores were operated by a total of 15,907 firms. Sales totaled $7,514.9 million in 1982. (Later figures for this store type are not published by the Census Bureau).

Sporting Goods Stores (continued)

As previously noted, in 1982 leased departments were counted as separate specialty stores in their proper classification. In a supplemental report for 1982 (Miscellaneous Subjects, RC82-1-4), the Census Bureau reported a total of 2,017 leased departments operated in main stores were re-classified in the 1982 census as general line sporting goods stores. These departments were operated by two firms, the names of which were not divulged by the Bureau due to disclosure restrictions.

These leased operations had a combined total sales volume of $1,060.5 million--24.2% of the $4,377.5 million in total reported sales of general line sporting goods stores in business anytime in 1982.

The following tables profile the number and sales of sporting goods store operations in 1982:

Sporting Goods Store Firms (General Line & Specialty Line)
By Total Sales Size: 1982
(Retail firms with payroll)

		Percent of Total		
	No. of Firms*	Firms	Stores	Sales
Total	14,508	100.0	100.0	100.0
Sales volume:				
$10.0 mil. or more	30	0.2	14.0	27.7
5.0 mil. - $ 9.9 mil.	59	0.4	1.5	5.4
2.5 mil. - 4.9 mil.	157	1.1	2.3	7.6
1.0 mil. - 2.49 mil.	795	5.5	6.6	16.4
Less than $1.0 mil.	13,467	92.8	75.6	42.8

* Covers 14,508 firms in operation the entire year 1982. There were 15,907 firms in operation anytime during the year, operating 20,152 stores, with sales totaling $7,514.9 million.

Sporting Goods Store Single & Multi-Unit Operations: 1982
(Retail establishments with payroll)

	Percent of Total		
	Firms	Stores	Sales
Total	100.0	100.0	100.0
Single unit organizations	91.4	72.1	52.4
Multi unit organizations	8.6	27.9	47.6
Operating: 2- 9 stores	8.4	14.4	22.7
10 or more stores	0.2	13.5	24.9

(continued)

Sporting Goods Stores (continued)

Concentration of Largest Sporting Goods Store Firms: 1982
(Dollar figures in millions)

	Stores	Sales	Percent of Total Stores	Percent of Total Sales
All firms	20,152*	$7,514.9	100.0	100.0
4 largest firms	2,290	1,389.4	11.4	18.4
8 largest firms	2,377	1,589.8	11.8	21.2
20 largest firms	2,552	1,865.6	12.7	24.8
50 largest firms	2,757	2,145.6	13.7	28.6

* Total stores in operation anytime during the year.

Sporting Goods Stores (In Operation Entire Year) By Sales Size: 1982
(Dollar figures in millions)

	Stores	Sales	Percent of Total Stores	Percent of Total Sales
Sporting goods stores:				
General line	8,709	$4,195.2	100.0	100.0
Annual sales:				
$5.0 mil. +	31	239.6	0.4	5.7
$2.5 mil.-$ 4.9 mil.	136	461.4	1.6	11.0
$1.0 mil.-$2.49 mil.	726	1,088.7	8.3	26.0
$0.5 mil.-$0.99 mil.	1,526	1,055.3	17.5	25.2
$0.25 mil.-$0.49 mil.	2,525	904.7	29.0	21.6
Under $0.25 mil.	3,767	445.5	43.3	10.6
Specialty line	9,881	$2,888.2	100.0	100.0
Annual sales:				
$2.5 mil. or more	72	307.1	0.7	10.7
$1.0 mil.-$2.49 mil.	376	551.5	3.8	19.1
$0.5 mil.-$0.99 mil.	889	600.8	9.0	20.8
$0.25 mil.-$0.49 mil.	2,015	699.8	20.4	24.2
Under $0.25 mil.	6,529	729.0	66.1	25.2

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade (RC82-1-1)

Sporting Good Stores (continued)

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including Leased Departments)

	Stores		Sales of specified merchandise lines		
				Percent of total sales of—	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
General line sporting goods stores, total	9,252	100.0	$4,377,471	—	100.0
Sporting goods	9,252	100.0	3,100,916	71.1	71.1
Team equip. (institutional)	3,343	36.1	348,158	24.7	8.0
Team equip. (individuals)	7,834	84.7	380,467	10.5	8.7
Tennis equip.	6,983	75.5	295,585	8.4	6.8
Golf equipment	5,892	63.7	229,802	7.6	5.2
Snow/skiing equipment	1,651	17.8	193,558	12.7	4.4
Firearms/hunting equipment	6,110	66.0	385,041	12.2	8.8
Fishing tackle	2,643	28.6	177,568	8.9	4.1
Camping/backpacking equipment	5,908	63.8	358,654	11.3	8.2
Trophies, plaques	1,552	16.8	29,200	4.6	0.7
Bicycles, parts, accessories	423	4.6	28,798	10.1	0.7
Other sporting goods	7,544	81.5	684,085	18.2	15.6
Other merchandise lines:					
Activewear, except footwear	6,568	71.0	691,363	—	15.8
Men's & boys'	6,568	71.0	408,849	12.6	9.3
Women's & girls'	6,236	67.4	282,514	9.2	6.5
Footwear	7,164	77.4	442,247	12.7	10.1
Other merchandise, receipts	—	—	132,945	—	3.0
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Sporting goods	10,900	100.0	2,513,229	80.1	80.1
Team equipment (institutions)	615	5.6	35,083	19.8	1.1
Team equipment (individuals)	581	3.3	38,473	21.3	1.2
Tennis equipment	1,117	10.2	76,185	18.9	2.4
Golf equipment	2,359	21.6	410,060	66.2	13.1
Snow/skiing equipment	1,775	16.3	348,836	42.9	11.1
Fireams/hunting equipment	2,143	19.7	503,486	65.7	16.0
Fishing tackle	1,959	18.0	221,370	42.3	7.1
Camping/backpacking equipment	1,273	11.7	128,287	23.1	4.1
Trophies, plaques	355	3.3	6,577	8.8	0.2
Bicycles, parts, accessories	3,605	33.1	617,546	68.7	19.7
Other sporting goods	1,994	18.3	127,326	17.9	4.1
Other merchandise lines:					
Activewear, etc. footwear	2,493	22.9	245,786	—	7.8
Men's & boys'	2,493	22.9	134,848	15.9	4.3
Women's & girls'	2,177	22.0	110,938	15.0	3.5
Footwear	2,089	19.2	76,096	10.5	2.4
Other merchandise, receipts	—	—	302,329	—	9.6

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY STORE TYPE

Department Stores

Department stores accounted for 15.3% of the total sales of sporting goods in retail outlets with payroll in 1982. Over half (59.2%) of the department stores reported sales of this merchandise line, with sales totaling close to $2.0 billion.

Sporting Goods & Related Product Sales in Department Stores: 1982

	Stores		Sales of specified merchandise lines		
				Percent of total sales of—	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Department stores, total	9,981	100.0	$99,170,163	—	100.0%
Sporting goods, total	5,909	59.2	1,994,501	3.1	2.0
Bicycles, parts, accessories	5,219	52.3	585,637	1.1	0.6
Other sporting goods	5,181	51.9	1,408,864	2.4	1.4
Activewear, excl. footwear, total	—	—	2,008,564	—	2.0
Men's	6,931	69.4	796,943	1.0	0.8
Women's	6,175	61.9	1,211,621	1.6	1.2

Note: leased departments are not included in the above. Catalog mail order desk sales are included.

Each store location is separately counted in the above table. Department stores include both traditional department stores and discount department stores which meet the definition of this store type under the Standard Industrial Classification (SIC) system. Department stores operated by mail order chains and mass merchandisers are also included in the above table.

Source: U.S. Bureau of the Census:
1982 Census of Retail Trade (RC82-1-3)

NOTE: For details on department store operations, as reported in the 1982 Census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

Adjusted to include leased departments (not included in the 1982 Census reports on department stores), total department store sales in 1985, according to the Census Bureau, amounted to $134.7 million, 25.7% over the comparable 1982 total amounting to $107.2 million.

The NRMA reported that sporting goods contributed a typical, or median, 0.5% of sales in their reporting department stores. This is in contrast with the Census Bureau's overall figure for all department stores of 2.0%.

Department Stores (continued)

Selected Typical (Median) 1984 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Women's & Misses' Active Sportswear*	Junior Active Sportswear*	Men's Active Sportswear*	Sporting Goods
Net sales % change from last year	+ 13.9	+ 12.2	+ 13.1	+ 3.9%
Sales % to total store	1.1	0.6	1.0	0.5
Net sales % of merchandising division	4.4	2.4	7.1	7.5
$ sales per square foot of selling space	$220.3	$183.4	$235.8	$172.1
Cumulative markon, %	52.0	52.5	50.5	41.4
Gross margin, % of sales including cash discounts	44.7	44.0	40.9	30.2
Markdowns, retail, % of sales	25.9	27.7	22.9	24.1
Returns, % of sales	9.3	7.8	11.6	na
Number of stock turns	3.7	4.0	3.1	1.8
Sales people's salaries, % of sales	7.0	5.0	6.7	na
Sales promotion, % of sales	3.9	4.4	4.0	na

* Active sportswear includes swimwear, beachwear and accessories and all other summer playwear; ski jackets, pants and other winter sportswear.

Source: National Retail Merchants Association, Merchandising & Operating Results (1985 Edition).

Sporting/Athletic Goods/Bicycles

Exercise Equipment

Growth in the $1.2 billion home exercise market, which soared in the 1980-1984 period, has leveled off. However, a report by the Sporting Goods Manufacturers Association for the first quarter of 1985 showed this category to be the second largest segment (after athletic footwear) of total dollar purchases for sporting/athletic goods. Exercise cycles, multi-purpose home gym and rowing machine purchases accounted for more than 80% of sales.

Saturation of the market for some of the many diverse products comprised in this market is cited for the overall slowdown in business, though high-end equipment is doing well which appeals to the growing number of upscale young adults with substantial disposable income. Higher priced exercise bikes (over $150) increased in sales by 34% in 1984. Complete home gym systems and rowing machines, which are among the most expensive products in the fitness market mix, continue to be best-sellers.

Sporting/Athletic Goods/Bicycles

Exercise Equipment (continued)

Favorable demographic trends and continued interest in physical fitness indicate a long-term growth in the market which will adjust to the needs of maturing customers. Marketers are relying on introductions of new, more sophisticated equipment, incorporating electronic gadgets to measure heart rate, calories consumed, etc. About 30 million people claimed to use home exercise equipment of some type--everything from a $3 jump rope to a $3,000+ home gym system, according to a 1985 study. This number is expected to grow.

Tennis

The tennis market peaked in 1976 then declined until 1983, reaching a level at which demand has been fairly stagnant. According to a Gallup Organization survey, only about one in 10 adults played tennis at anytime in 1985, about half the participation rate in the peak period. The total market for tennis equipment (not including apparel and footwear) was reported at $300 million in 1985 by the National Sporting Goods Association.

Manufacturers and dealers have worked together to try to stimulate business, including sponsorships of amateur and professional matches and advertising/promotions designed specifically to attract upscale, long-time players, as well as new, younger players.

However, thus far in 1986 he decline in tennis activity seems to be continuing. The Tennis Foundation of North America reports that tennis racquets sales in the first two months of the year were 11.5% below the total in the same 1985 months.

Racquetball

Much like the tennis market, the racquetball market has remained at about the same level since 1983, with total retail sales at approximately $75 million. Following the boom in the late 1970's and early 1980's, retailers in this segment of the industry have struggled to stimulate sales.

Trade sources generally agree that the racquetball market has now stabilized and can soon begin to grow again. Estimates for 1986 are for the industry to show a growth rate of about 3% in retail sales, its biggest gain since 1982. The growing participation of women in the sport will stimulate sales. According to the National Sporting Goods Association (NSGA), about 44% of new participants in the sport in 1985 were women and they now represent a third of the 9.9 million participants.

Many facilities originally designed to cater to the racquetball clientele are now promoting other sports, such as aerobics, exercising and four-wall-volleyball to maintain usage of these facilities. Club owners are promoting free clinics and free instruction to stimulate participation, while the evolution of the racquetball clubs into multi-sport facilities has exposed more people to the sport. Manufacturers in the industry have formed the Racquetball Manufacturers Association (RMA) in order to promote the industry.

RETAIL SALES BY PRODUCT

Sporting/Athletic Goods/Bicycles

Water Sports

Swimming is the one activity, other than fitness, which can be carried out year-round on a nationwide basis, due to the great number of indoor pools, as well as outdoor pools, both public and private. It is the number one participation sport in the U.S., generating business estimated at $770 million in 1985.

Beyond swimming, new water sports have stimulated sales for dealers in areas that can benefit from the availability of sun and surf. Included is surfing, boardsailing, scuba diving, snorkeling. The fastest growth for sporting goods dealers in the right areas has been noted in boardsailing, which offers a market for a number of items, such as booms, wet suits and accessories, as well as boards; and retailers are continuing to offer a greater variety of equipment.

Hazards involved in the use of sailboards, however, are great, and the high cost of liability insurance and the fact of possible injuries will tend to cloud the future of boardsailing in many areas.

Golf

The $650 million golf equipment market reversed the one year decline in retail sales it recorded in 1984 to post a 10% increase in 1985, according to the National Sporting Goods Association. These figures it must be noted include only equipment (clubs, balls, bags) and exclude clothing ($230 million at retail) and golf shoes ($118 million).

The long range outlook for the golf industry is for continued, long-term steady growth of about 5% per year. Currently, about 18 million people play golf regularly, playing 445 million rounds per year. There are 13,181 golf courses in the U.S. and the numbers have been growing. In 1983, 104 new courses were added to the total, 136 in 1984 and 145 in 1985.

Ski

About 21 million skiers helped ring up sales of ski equipment amounting to some $550 million in 1985, while ski apparel sales were at about $320 million. Overall, a 10% increase in sales was recorded for the year. About $400 million was spent for downhill equipment (an increase of 10%) while cross country skiing recorded growth of about 5% in 1985 compared with 1984.

Marketing techniques have been sharpened over the last several years in direct response to an increasingly competitive market. Many manufacturers have turned to rebates, in-store promotion, give-aways and fit guarantees. Retailers report that the efforts of manufacturers have been successful, and have also kept discounters and diverters from establishing themselves as a force in the market.

The ski industry is, of course, dependent on snow conditions. Most areas have been lucky in the last few years, after a couple of bad seasons.

RETAIL SALES BY PRODUCT

Sporting/Athletic Goods/Bicycles

Bicycles

The bicycle market, which had been flat for a few years, was propelled into a strong growth stage in 1983 due to stronger marketing efforts of U.S. manufactures, by the overall recovery of the economy and favorable demographics. According to the National Sporting Goods Association, 10.1 million bicycles were sold in 1984 compared with 8.9 million in 1983. This marked the third straight year unit volume increased and was the industries best showing since 1973 when the oil crisis caused abut 15 million bicycles to be sold. Industry analysts expect a 10% unit volume increase in 1985.

A survey of bicycle use by adults (those age 16 and over) by the Bicycle Federation indicated the number of regular cyclists (those riding at least once a week) increase 10% in 1984; and another 10% gain was estimated for 1985. Of the some 25 million current bicycle riders, some 70% are 13 years of age or older; 18% are 25-34 years of age according to the Federation.

Bicycle manufacturers have responded to the growing adult market, as the baby boomers have matured, by shifting their model mix to lightweight models with 10 or more speeds. However, the single speed types have become increasingly popular. The best selling bicycles are the 10-18 speed lightweight, bent-handle bar racing models which account for about 40% of the market. The fastest growing segment of the market is the all-terrain, or BMX bike, which accounted for about 5% of the 10.1 million sold in 1984.

Men's Activewear

Industry analysts estimate that retail sales of apparel classified as "activewear" for men amounted to about $2.2 billion in 1985. The latest government data on retail sales of men's activewear, from the census of retail trade, reported sales through all retail outlets with payroll amounting to $1.8 billion in 1982.

Yearly estimates on growth of men's and boys' activewear sales are compiled by Kurt Salmon Associates, a New York based consulting firm.

Annual Change in Male Active Apparel Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Men's activewear	+ 5%	+12%	+ 6%	+28%
Boys' activewear	+ 6	+11	+17	+25

(p) preliminary
(e) estimated

Source: Kurt Salmon Associates,
Softgoods Outlook, 1986
(Based on the KSA/NPD Purchase Panel of 18,000 households)

Men's Activewear (continued)

The retail market for men's activewear has grown increasingly competitive. Sporting goods stores, which have always held a major share of apparel for active sports participants, have broadened their apparel stocks to include the active looks sought by non-participants, while department stores and chains have become more competitive in trying to attract the sports participants, and those who want to look like participants.

Trade reports indicate that the men's market has become more stratified by brand name. Sporting goods stores opt more for the authentic brands like Adidas, Nike and Puma, while department and specialty stores make their activewear statements via collections by Jantzen, Catalina, Saratoga, Jockey and other traditional sportswear makers. Many stores are increasing their private label business in an effort to offer more fashion and unique items. Warm-ups, knit shirts and pull-on pants are currently the major activewear styles. In sporting goods stores, men's specialty stores and department stores, warm-ups in all prices, from private labels to designer labels and in a variety of fabrications continue to prove their selling power, making up one-third of some stores business according to industry insiders.

As the 1986 season progresses, fashion seems to be taking second place to fabric in order to win the activewear market. Retailers report that while street activewear in on the decline, men's authentic activewear is climbing. Many manufacturers in order to gain niches in the industry are now positioning themselves as casual activewear in order to fit between the traditional activewear producers and the fashion-oriented producers.

The growth of activewear overall has caused many sporting goods stores to realign their merchandise mixes in the face of declining equipment sales. Many sporting goods stores are now reporting the softgoods, particularly apparel are now making a much larger percentage of their sales.

Women's Activewear

Market estimates on sales of women's activewear which includes "fashion" active as well as performing or functional activewear, put the category at about $3.3 billion in 1985, 10% above the $3.0 billion reported for 1982 in the Census of Retail Trade, U.S. Census Bureau. According to data from Kurt Salmon Associates, activewear for women and girls has been one of the best performing apparel categories, on a unit sales basis, since 1982. For 1986, this source estimates that women's sales will increase by about 8%, while girls' will gain 5%.

Annual Change in Female Activewear Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Women's activewear	+ 8%	+ 15%	+ 16%	+ 32%
Girls' activewear	+ 5	- 6	+ 23	+ 33

(p) preliminary (e) estimated

Source: Kurt Salmon Associates,
Softgoods Outlook, 1986
Based on the KSA/NPD Purchase panel of 18,000 households

Women's Activewear (continued)

Many retailers are cutting back on their fashion orientation and are moving towards a more authentic look in the women's end of the market. Analysts cite the desire of customers for multi-function apparel as one of the main reasons for the recent trend towards the basic activewear look, as well as the lower price which comes with the basic look.

In order to cope with the swing in the market, some retailers are selling activewear in more than one location in their stores. While most are selling the fashion oriented apparel in their traditional sportswear departments, some are also adding the functional end in with their sports equipment. Fabric and construction are becoming more important in the activewear market. Retailers are citing increases in sales of materials such as fleece, velour and terry in their sports apparel.

The gain in activewear sales to women is expected to continue for the long term. Currently, more than half of all women under the age of 49 report they exercise regularly, and the numbers of women participating in sports is growing at about twice the rate of men. With more women actively participating in sports and seeking new sports to participate in, apparel sales catering to these women should continue to grow, and the popularity of the active "look" among non-participants is expected to continue.

Athletic Footwear

The total athletic footwear market, including rugged and walking shoes, as well as other types of active sports footwear, is placed by a trade source at $2.5 billion in 1985, (Footwear News, February 24, 1986). Through the rest of the 1980's growth in the athletic footwear segment is expected to average between 5-10%. Due to the heightened exposure of fashion that now characterizes this industry, however, some segments are expected to show spurts of higher growth through the last half of this decade. The biggest sales gains are expected to be in fitness shoes (high, low and three quarter heights) in solid colors, solid whites and in color trims. Losers are expected to be in running shoes and basketball shoes, while performance and leather joggers are expected to remain at about the same levels.

In order to compete in this increasingly fragmented market, many manufacturers are diversifying their product lines to penetrate smaller niches and are also seeking to differentiate themselves according to performance, styling and price point.

A glut of low-end shoes, too many models, as well as too many discount retailers and low margins are seen as the major problems facing the athletic footwear industry at the retail level.

Based on a series of purchase tracking studies among 50,000 U.S. households in three four-month periods each year, the Footwear Market Index (Kormos, Harris & Associates, Inc., Nashville, Tenn.) measures trends in the total market for athletic/tennis footwear.

(continued)

Athletic Footwear (continued)

The athletic footwear market includes two distinct types of footwear: tennis shoes, sneakers and the like (footwear with soles galvanized to fabric uppers) and shoes primarily of leather, including jogging, running shoes, etc. According to the FMI reports, total consumer purchases of athletic/tennis shoes in 1985 gained 18% compared with 1984. The increased participation of women in active sports and fitness programs, aerobics, as well as the increases in popularity of tennis/athletic footwear for street wear, resulted in a 21.8% increase in purchases of women's athletic/tennis shoes; men's purchases went up 19.1%; boys', 18%; girls', 1.0%.

Purchases of Adult Athletic/Tennis Footwear, 1984, 1985
(Percent of pairs)

	1985	1984
Total purchases	100.0%	100.0%
Athletic/jogging footwear	38.3	41.7
Men's	18.7	22.6
Women's	19.6	19.1
Tennis/sneakers	61.7	58.3
Men's	31.5	28.4
Women's	30.2	29.9

Purchases of All Athletic/Tennis Footwear By Classification, 1982-1985
(Percent of pairs)

	1985	1984	1983	1982
Athletic/tennis footwear, total	100.0%	100.0%	100.0%	100.0%
Men's	36.5	36.1	35.1	35.6
Boys'	18.5	18.6	18.2	20.0
Women's	36.2	35.1	36.2	33.9
Girls'	8.8	10.2	10.4	10.4

Source: Footwear Market Index.

RETAIL ADVERTISING

Monthly Distribution of Retailers' Newspaper Advertising Linage, 1982

January	1.7%	6.7%
February	3.7	6.8
March	7.2	7.9
April	10.3	8.6
May	13.2	8.0
June	12.8	7.9
July	6.3	8.3
August	9.5	10.6
September	6.7	8.7
October	6.2	6.6
November	10.9	7.8
December	11.5	12.1

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

CONSUMER PRICES

While the overall consumer price index for goods and services rose 3.6% in 1985, the index for sporting goods and equipment rose at a slower rate of 2.1%. During 1985, the CPI for indoor and warm weather sport equipment and that of other sporting goods both registered declines.

Between February 1985 and 1986, consumer prices overall rose 3.2%, while the sporting goods CPI was up 2.1%.

Consumer Price Indexes for Specified Sporting Goods
(December 1977=100 unless otherwise indicated)

	February Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All items*	327.5	317.4	+ 3.2%	322.2	311.1	+ 3.6%
Sporting goods & equipment	142.7	139.8	+ 2.1	140.9	138.0	+ 2.1
Sport vehicles	151.2	146.7	+ 3.1	148.3	143.1	+ 3.6
Indoor & warm weather sports equipment	116.9	117.6	- 0.6	117.1	117.6	- 0.4
Bicycles*	203.7	199.7	+ 2.0	201.7	199.9	+ 0.9
Other sporting goods & equip.	131.6	133.2	- 1.2	132.0	135.0	- 2.2

* 1967 = 100

Source: U.S. Department of Labor, Bureau of Labor Statistics

Men's Activewear

A recent study of the shopping preferences of 25-35 year old men, conducted by The Gallup Organization, indicated that in this group, men tend to shop for athletic apparel twice a year or less. The most frequently shopped stores were sporting goods stores and department stores while purchases tend to be less than $100.

Type of Store Usually Shopped

		Income Level	
	Total	Under $30,000	Over $30,000
Sporting goods stores	42%	35%	37%
Department stores	36	35	38
Discounters	8	13	4
Men's specialty stores	8	7	9
Mass merchants (Sears, Penney, Ward)	6	9	4
Off-price/factory outlets	2	--	3
Catalog/mail order	1	2	--
All other outlets	2	3	2
Don't know/no answer	3	3	3

Note: totals add to more than 100.0% due to multiple responses.

Men's Activewear (continued)

Frequency of Shopping for Activewear

		Income Level	
	Total	Under $30,000	Over $30,000
Once a week	1%	--	--
Two or three times per month	3	4	2
Once a month	6	6	5
Every couple of months	15	15	15
Twice per year	24	23	27
Once per year	22	22	25
Less than once per year	12	13	9
Never	17	16	15

Annual Spending For Activewear

	Total
Less than $100	38%
$100 - $199	33
$200 - $299	14
$300 - $399	6
$400 or more	4
Don't know/no answer	5

Source: The Gallup Organization
Apparel Merchandising, October 1985

Women's Swimwear

Information on the purchase patterns for women's swimsuits is available from a survey of 1,500 women conducted the The Gallup Organization. According to this study nearly two out of three women report buying their swimsuits on sale, and are most apt to buy swimsuits in early summer.

Purchases of Women's Swimwear by Price Points

		Age of Purchaser					Income of Purchaser (thousands)			
Price Paid	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20-$30	$30-$40	$40+
Less than 15%	12%	16%	16%	9%	7%	4%	17%	12%	8%	3%
$ 15 - $ 19.99	12	20	9	11	14	4	16	12	10	6
$ 20 - $29.99	38	38	46	40	31	32	37	43	48	38
$ 30 - $39.99	22	15	19	23	23	31	13	25	22	29
$ 40 - $49.99	8	3	5	11	11	11	4	7	8	14
$ 50 or more	4	8	3	2	6	—	5	1	2	9
Don't know/no answer	5	—	3	6	6	19	8	2	5	1

Women's Swimwear (continued)

Purchases of Women's Swimwear by Store Type

		Age of Purchaser					Income of Purchaser (thousands)			
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20-$30	$30-$40	$40+
Department stores	64%	55%	77%	59%	61%	57%	56%	56%	71%	82%
Mass merchandisers (Sears, Penney, Ward)	14	13	10	16	16	12	16	16	9	3
Specialty stores	11	18	11	6	13	12	10	12	11	11
Discount stores	10	7	8	17	8	4	13	13	16	3
All other stores	12	20	9	10	9	8	10	20	13	9
Don't know/no answer	2	2	—	1	—	12	4	—	2	—

Note: Columns add to more than 100.0% due to multiple responses.

Number of Swimsuits Purchased In Year

	Age of Purchaser					Region				
	Total	18-24	25-34	35-49	50-64	65+	East	Midwest	South	West
One	58%	54%	67%	59%	52%	52%	62%	52%	65%	51%
Two	12	30	10	8	5	4	13	8	12	14
Three	3	5	3	2	—	—	3	1	4	3
Four	1	2	1	2	—	—	—	1	3	—
Five or more	1	—	1	—	—	—	1	—	—	—
None	22	8	17	22	39	33	18	34	11	26
Don't know/no answer	4	2	1	7	4	12	3	4	4	7

Seasonal Trends in Women's Swimsuit Purchases

Total	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
100.0%	1%	3%	6%	13%	28%	36%	21%	10%	5%	2%	1%	1%

Source: The Gallup Organization
Apparel Merchandising, September 1985

Athletic Footwear

Buying practices analyzed in the Footwear Market Index (FMI) purchase tracking studies indicate that in 1984, almost 23% of men's athletic footwear (including all types) was bought primarily for wear in active sports, down from over 25% in 1983. Of women's athletic footwear bought in 1984, 23% was primarily for sports participation.

(continued)

Athletic Footwear (continued)

Principal Use of Men's & Women's Athletic Footwear, 1982-1985
(Percent of pairs purchased)

	1985	1984	1983	1982
Men: total athletic purchases	100.0%	100.0%	100.0%	100.0%
Principal use:				
Everyday/street wear	36.5	35.8	32.9	36.6
Work/school	30.0	27.8	27.2	24.1
Sports participation	18.9	22.8	25.2	26.4
Other	14.6	13.6	15.7	12.9
Women: total athletic purchases	100.0%	100.0%	100.0%	100.0%
Principal use:				
Everyday/street wear	35.6	34.6	29.2	28.5
Work/school	24.5	24.5	27.7	22.0
Sports participation	21.5	23.2	25.4	30.8
Other	18.4	17.7	17.7	18.7

Source: Kormos, Harris & Associates, Nashville, Tenn. Footwear Market Index

Teenagers

According to a study of 1,500 teenage girls and boys nationwide conducted by Teen-age Research Unlimited, teens support their involvement in sports with purchases of equipment, apparel and footwear. For example, nearly half of teen boys polled in the study said they bought sports equipment in the last year and 22% of the girls made similar purchases. Also, 44% of girls had bought a pair of athletic shoes within the past three months.

Teens are big buyers of apparel. According to the findings, within the past three months, 49% of the males questioned and 43% of the females had purchased athletic apparel.

Selected results from the most recent survey covering information from 1985 is covered below.

Products Owned by Teenage Girls, 1985
(Base: girls age 13-19 years)

	Number (000)	Percent
Total, all girls	12,513	100.0%
Products:		
Bicycle	9,885	79.0
Golf clubs	626	5.0
Ice skates	3,629	29.0
Motor scooter	626	5.0
Skis	876	7.0
Tennis racquet	3,379	27.0

Teenagers (continued)

Products Teenage Girls Expect to Acquire

(Base: girls age 13-19 years)

	Number (000)	Percent
Total, all girls	12,513	100.0%
Products:		
Bicycle	2,377	18.0
Golf clubs	250	2.0
Ice skates	626	5.0
Motor scooter	125	1.0
Outboard motor	125	1.0
Skis	125	1.0
Tennis racquet	876	7.0

Purchase and Purchase Influence of Teenage Girls For Specified Products

(Base: all girls owning each product)

	Purchased by Teen Girl		Influenced the Purchase		Remainder of Owners
	(000)	Percent	(000)	Percent	Percent
Bicycle	1,384*	14%*	6,326	64%*	22%
Golf Clubs	213	34	200	32	34
Ice Skates	1,524	42	944	26	32
Motor Scooter	182	29	444	71	--
Skis	350	40	342	39	21
Tennis Racquet	1,216	36	912	27	37

* Read as: 1,384,000 teen girls purchased bicycles themselves -- 14% of all bicycle owners; of 64% of the owners the teen girls influenced the selection.

Source: Seventeen Magazine
1985 Youth Rand Poll

According to the 1985 Teen-age Research Unlimited survey, swimming was the most popular sport for girls between the ages 12 and 19 to participate in outside of school. Exercise/aerobics ranked second, while bicycling was third.

Teenage Girls

Activities Participated in Outside of School in Past Twelve Months
(Base: female teens 12-19)

	Number (000)	Percent
Swimming	10,210	71.7%
Exercise/aerobics	9,993	70.8
Bicycling	8,158	57.8
Baseball/softball	7,283	51.6
Jogging/running	7,185	50.9
Roller skating	6,324	44.8
Tennis	6,267	44.4
Basketball	6,084	43.1
Bowling	6,055	42.9
Fishing	4,827	34.2
Horseback riding	4,164	29.5
Camping/backpacking	4,093	29.0
Sailing/boating	3,868	27.4
Ice skating	3,599	25.5

Source: Seventeen Magazine,
Teen-age Research Unlimited, 1985

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now--1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumber buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued this year by the U.S. Census Bureau. Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S.mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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HOME TEXTILES & RELATED PRODUCTS

Market Trends

A major change has occurred in the profile of the home textiles industry in the U.S. as of early 1986. Through acquisitions, six major mills have become three megamills. They are Springs/Lowenstein, Stevens/Burlington and Fieldcrest/Cannon. Within the space of a few weeks the entire competitive picture within this market has completely changed, with changes still evolving, as operations become integrated.

At the same time, major consolidations have been underway at the retail level which are resulting in a consolidation of buying power. In addition, some large department stores (such as Gimbels), which had catered to middle-income customers are going out of business, leaving that field to large, successful discount chains, such as Caldor, Marshall's and Zayre, while higher-priced, upscale department stores were able to maintain earnings. The mills must now adapt not only to vast changes in their operations, but also in their retailer-customer bases.

Bigger mills, representing a sizeable share of total supply, have a better chance of pushing really innovative programs through the stores. On the other hand, buyers in consolidated operations have more clout. The small independent retailer may be the loser.

The year 1985 was not a good one for sheet/pillowcase producers, as a whole. Unit shipments were down 7% compared with 1984, and the value of shipments declined almost 3%. Quality, higher-priced merchandise of all types did best last year, and home textiles were not an exception. Mill shipments of high-count sheets and of all-cotton sheets registered strong gains. Shipments of finished terry towels by U.S. mills last year declined 1.3% in quantity and 2.8% in value compared with 1984.

The total retail market for home textiles and related products is estimated at about $12 billion. With an improved economy and a rise in disposable income, plus lower interest rates and a surge in new home or replacement home sales, the outlook for home textiles is more favorable than it has been for sometime. Megamills are positioned to take good advantage of this. Retailers are getting better control of promotions, becoming more selective in designer name offerings and in price points.

An analysis by Kurt Salmon Associates early this year looked for an increase of 2% in units purchased by consumers in 1986, following a 1% decline in 1985 compared with 1984, and a 4% decline in 1984 from the previous year.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all manufacturers in the U.S. which have one or more paid employees is compiled every five years by the U.S. Bureau of the Census. Results from the latest, covering operations in the industries primarily involved in the production of home textiles and related products in the year 1982, are covered below. In addition, comparable figures are reported from the 1983 annual survey of manufactures. The Census Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity during intercensal periods.

The value of shipments and miscellaneous receipts in the curtain and drapery industry in 1983 amounted to $1,098 million, a gain of 3.4% compared with the 1982 total, and 8.4% over the total reported in 1977. Shipments and miscellaneous receipts in the home textiles (not elsewhere classified industry) were reported at $3,440.6 million in 1983, which was 5.5% above the 1982 total and 50% greater than the value reported for 1977, as measured in current-value dollars.

Curtains & Draperies
(SIC 2391*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	1,327	1,650	--
Number of establishments	1,294**	1,371	1,712	- 5.6%
Number with 20 or more employees	238**	254	324	- 6.2
Employees, total (thous.)	24.0	24.1	31.7	- 0.4
Production workers (thous.)	19.8	19.7	27.2	+ 0.5
Payroll (mil. $)	$ 232.5	$ 233.7	$ 224.7	- 0.5
Value added by manufacture (mil. $)#	462.0	442.1	407.3	+ 4.5
Value of industry shipments (mil. $)##	1,098.0	1,062.0	1,013.1	+ 3.4
Capital expenditures, new (mil. $)	4.0	6.3	7.2	- 36.5

Home Textiles, n.e.c.
(SIC 2392*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	882	980	--
Number of establishments	910**	958	1,051	- 5.0%
Number with 20 or more employees	384**	399	403	- 3.7
Employees, total (thous.)	46.8	49.3	47.5	- 5.1
Production workers (thous.)	37.8	39.8	39.8	- 5.0
Payroll (mil. $)	$ 503.8	$ 518.2	$ 366.4	- 2.8
Value added by manufacture (mil. $)#	1,307.4	1,249.0	782.9	+ 4.7
Value of industry shipments (mil. $)##	3,440.6	3,262.2	2,294.0	+ 5.5
Capital expenditures, new (mil. $)	25.0	38.8	26.9	- 35.6

(continued)

GENERAL INDUSTRY STATISTICS

Drapery Hardware, Blinds & Shades
(SIC 2591*)

	1983	1982	1977	% Change 1983/1982
Number of companies	na	404	435	--
Number of establishments	427**	435	456	- 1.8
Number with 20 or more employees	119**	127	85	- 6.3
Employees, total (thous.)	16.8	15.7	13.6	+ 7.0
Production workers (thous.)	12.5	11.7	10.3	+ 6.8
Payroll (mil. $)	$ 257.5	$ 223.7	$ 145.6	+ 15.1
Value added by manufacture (mil. $)#	712.4	556.6	345.0	+ 28.0
Value of industry shipments (mil. $)##	1,332.1	1,114.4	675.1	+ 19.5
Capital expenditures, new (mil. $)	18.7	31.3	16.7	- 40.2

n.e.c. not elsewhere classified
na not available

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as shown below:

** County Business Patterns 1983, U.S. Bureau of the Census. (Each business location is separately counted as an "establishment").

SIC 2391 covers establishments with one employee or more primarily engaged in manufacturing curtains and draperies from purchased materials. Manufacturers of lace curtains made on lace machines are not included.

SIC 2392 (officially designated "House Furnishings, n.e.c.") covers establishments with paid employees primarily engaged in manufacturing home textiles from purchased materials, including towels, sheets, blankets, comforters, bedspreads, pillowcases, pads; also slip covers, tablecloths (fabric and plastic), pillows, mops, garment bags, etc. Weaving mills which also produce finished home textile products (sheets, tufted bath mats, blankets, etc., are not included in this industry, nor are electric blankets (made in electric housewares industry).

SIC 2591 covers establishments with paid employees primarily engaged in manufacturing curtain and drapery rods, poles and fixtures, venetian blinds and other window blinds and shades, regardless of the materials used, except canvas shades and awnings.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished product inventories. It avoids the duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries is covered in the section on PRODUCT SHIPMENTS.

Source: U.S. Bureau of the Census, Census of Manufactures, 1982, 1977
Annual Survey of Manufactures, 1983

GENERAL INDUSTRY STATISTICS

Employment & Earnings

Average employment in the curtains and draperies industry declined 2.6% in 1985 compared with 1984, following a 6.4% gain noted for the year 1984 compared with 1983. Comparable figures for production workers indicated a 4.1% drop in 1985 vs. a 6.9% rise in 1984.

In the home textiles industry, total employment in U.S. mills averaged 50.5 thousand last year, down 3.6% compared with the 1984 level. The same decline was noted in the average number of production workers in the industry. In 1984 compared with 1983, total employment averaged 4.8% above the 1983 level while production worker employment averaged a gain of 5.9%.

Some differences will be noted for average employment data on an annual basis compiled by the U.S. Bureau of Labor Statistics and by the U.S. Census Bureau due to a difference in methodology in compiling this data.

Employment & Earnings in the Home Textiles Industry

	Annual Averages				% Change	
	1985	1984	1983	1982	1985/82	1985/84
Curtains & draperies (SIC 2391)						
All employees (thous.)	25.9	26.6	25.0	24.0	+ 7.9%	- 2.6%
Production workers (thous.)	20.9	21.8	20.4	19.5	+ 7.2	- 4.1
Avg. weekly earnings	$202.45	$195.38	$188.44	$162.75	+24.4	+ 3.6
Avg. hourly earnings	5.37	5.21	4.92	4.65	+15.5	+ 3.1
Avg. weekly hours	37.7	37.5	38.3	35.0	+ 7.7	+ 0.5
Home textiles, n.e.c.(SIC 2392)						
All employees (thous.)	50.5	52.4	50.0	47.1	+ 7.2	- 3.6
Production workers (thous.)	43.1	44.7	42.2	39.0	+10.5	- 3.6
Avg. weekly earnings	$223.85	$215.99	$212.07	$195.14	+14.7	+ 3.6
Avg. hourly earnings	5.86	5.61	5.41	5.19	+12.9	+ 4.4
Avg. weekly hours	38.2	38.5	39.2	37.6	+ 1.6	+ 0.8

n.e.c. not elsewhere classified

Source: Bureau of Labor Statistics,
Employment & Earnings

Industry Concentration

The structure of the linens/domestics segment of the home textiles industry has undergone a vast change in recent months. The problems the industry had been encountering are attributed to too many mills, resulting in overproduction, underutilization of mills, declining sales, poor profitability and inroads by imports. At the same time, changes in the competitive nature of the retail market, involving the growing importance of the large chains and upscale mass merchants who were pushing into areas usually dominated by department stores, on one hand, and the growing importance of another tier -- the discounters, and wholesale clubs -- put pressure on mills to control brand names that would fill each niche, without encroaching on each other. Mergers and consolidations seemed to offer a solution to some of these problems.

GENERAL INDUSTRY STATISTICS

Industry Concentration

In the latter part of 1985 and early 1986, three mill acquisitions completely changed the linens and domestics industry and the competitive picture. Six major producers suddenly become three "megamills" controlling upwards of 70% of the linens/domestics market.

The first of the three consolidations was the acquisition of M. Lowenstein Corp. by Springs Industries. Springs, which was already the dominant factor in the overall sheeting market, with a 28-30% share through its broad-based Middle America lines, obtained through this acquisition Lowenstein's Wamsutta brand of high thread count and all-cotton fashion sheets which have a strong position in upstairs departments, as well as its Pacific line which is geared to the mass market.

This news was just being absorbed when two more major consolidations quickly followed. In December 1985, Fieldcrest Mills, Inc. signed an agreement to buy the home textiles operation of Cannon Mills Co. (reported to be doing between $500 million and $600 million in annual sales). The purchase involved Cannon's towel, sheet, bedding, accessory, kitchen products and rug operations (as well as its 12 stores).

Total sales for Fieldcrest/Cannon's combined bed and bath business grew to slightly more than $1 billion, making this the nation's largest manufacturer of towels and the third largest producer of sheets. Through this purchase, Fieldcrest acquired some of the most modern equipment in the industry, including state-of-the-art sheeting and towel looms which produce goods that previously could only be obtained abroad -- such as jacquard towels, fiber-reactive beach towels and ultra-high-count sheets.

Fieldcrest already had the biggest share of department store solid terry business through its Royal Velvet line, and an overall 25% of department store towel business. Cannon was reported to have a 24% share of department store towel business, but its share of this business among mass merchants was put at 32% compared with Fieldcrest's 9%.

Fieldcrest's sheeting operation became greatly updated by the acquisition of Cannon, which had emphasized design, pricing and production of a variety of sheets in sub-counts and high-counts. Fieldcrest was reported to have an estimated 6 to 8% share in the department store sheeting market at the time of the acquisition, but Cannon's Monticello sheets commanded the leading position among mass merchandisers (20%) compared to Fieldcrest's St. Mary's brand which was reported to have a stake of less than 10%.

The industry's third megamill was created with the purchase by J.P. Stevens & Co. of Burlington's $200-million domestics division early this year. Again the competitive picture was revamped.

Stevens already had a formidable hold on the all-important mass merchant arena, while Burlington had made impressive gains among lower tier retailers with its trendy American Lifestyle sheet collections, juvenile patterns and waterbed lines. For the upscale market, Stevens acquired through Burlington the Laura Ashley lines, one of the most successful upstairs lines, with a retail volume expected to hit a record $200 million in 1986. Burlington had also scored a major coup by attaining the licensing rights for a line of sheets by Pierre Cardin, who is believed to have the broadest consumer recognition of all designers. For its part, Stevens had launched one of the industry's major designer collections, in Ralph Lauren.

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

The Burlington acquisition made Stevens the second largest producer in both sheeting and in towels.

The trade publication HFD has compiled estimates on the changing line-up of sheet and towel producers in the U.S. due to the recent acquisitions.

Before Springs-Lowenstein Merger			After Stevens-Burlington Merger		
SHEETS					
Rank	Mill	Market Share	Rank	Mill	Market Share
1.	Springs	18%	1.	Springs/Lowenstein	27%
2.	Stevens	16	2.	Stevens/Burlington	26
3.	Cannon	15	3.	Fieldcrest/Cannon	20
4.	WestPoint/Pepperell	14	4.	WestPoint/Pepperell	14
5.	Burlington	10	5.	Dan River	6
6.	Lowenstein	9	6.	Bibb	4
7.	Dan River	6	7.	Thomaston	2
8.	Fieldcrest	5			
9.	Bibb	4			
10.	Thomaston	2			
TOWELS					
1.	Cannon	30	1.	Fieldcrest/Cannon	47
2.	Stevens	19	2.	Stevens/Burlington	22
3.	Fieldcrest	17	3.	WestPoint/Pepperell	15
4.	WestPoint/Pepperell	15	4.	Dundee	8
5.	Dundee	8			
6.	Burlington	3			

Source: HFD (The Weekly Homefurnishings Newspaper)
January 20, 1986

The industry and market are not in a period of readjustment in response to the formation of the three megamills. The extent to which operations have been centralized thus far has varied. Springs and Wamsutta are reported to be the least consolidated. Stevens, on the other hand, has fully integrated Burlington's product lines under the Stevens umbrella and Fieldcrest has aligned Cannon's marketing and manufacturing staff with its own.

Meanwhile, there have been major consolidations at the retail level -- such as the merger of Federated's Richway division with Gold Circle and Shillito-Rike's with Lazarus, the consolidation of buying for Macy's Davison's group with New York stores, etc. -- all increasing the concentration of buying power and altering the mills' sales tactics. Mills now represent a smaller resource base, a larger share of available supply. Still to be determined is the extent to which large retail organizations will be willing to commit themselves to a single supplier of all classifications in home textiles.

Industry Concentration (continued)

In the domestic curtain and drapery industry, a few big manufacturers are getting bigger. Burlington is the largest producer of draperies, with a 40% share of the market. It is also the leading domestic producer of scatter rugs and of damask mattress ticking. Aberdeen Mfg. Co. ranks second, followed by Arley Merchandise Corp. Arley, which went public in 1985, concentrates on the mass merchants and chain stores, but plans to increase the share of business it does with department stores, particularly with their bed-coverings lines, which were reported to account for about 20% of their total business in 1985.

Aberdeen Mfg., which under the Crown Home Furnishings umbrella has one of the most diversified lines of any manufacturer in the industry (especially when the output of its sister company, Cameo Curtains, is considered) produces both high- and low-end curtains, draperies, bedspreads, comforters, shower curtains, sheets and kitchen products.

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. In view of the recent consolidations in the linens/domestics industry, the 1982 figures for that segment are now academic, but may provide some useful background information.

Type of Company Ownership & Share of Shipments, 1982

	No. of Companies	Plants		Employees		Value of Industry Shipments	
		No.	%	Thous.	%	Thous.$	%
Curtains & draperies	1,328	1,371	100.0	24.1	100.0	$1,062.0	100.0
Multiunit companies	71	114	8.3	10.6	44.0	550.9	51.9
Single-unit companies	1,257	1,257	91.7	13.5	56.0	511.1	48.1
Home Textiles, n.e.c.	880	958	100.0	49.3	100.0	3,262.2	100.0
Multiunit companies	123	201	21.0	33.0	66.9	2,374.2	72.8
Single-unit companies	757	757	79.0	16.3	33.1	887.9	27.2
Drapery hardware, blinds, shades	404	435	100.0	15.7	100.0	1,114.4	100.0
Multiunit companies	34	65	14.9	11.2	71.3	838.1	75.2
Single-unit companies	370	370	85.1	4.5	28.7	276.2	24.8

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Type of Organization, Subject Series MC82-S-5

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Share of Industry Shipments Accounted For By the Largest Manufacturing Companies, 1977, 1982

Industry	No. of Companies	Value of Shipments Total (Mil. $)	% Share Accounted For By Largest Companies Top 4	Top 8	Top 20	Top 50
Curtains & draperies						
1982	1,328	$1,062.0	22%	35%	48%	61%
1977	1,650	1,013.1	26	36	49	62
Home textiles, n.e.c.						
1982	880	3,262.2	23	33	49	65
1977	980	2,294.0	22	33	48	66
Drapery hardware, blinds, shades						
1982	404	1,114.4	43	62	75	85
1977	435	675.1	46	65	81	89

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Concentration Ratios in Manufacturing, Subject Series MC82-S-7

Industry Statistics By Employment Size of Plants, 1982

Industry	Plants Number	Plants %	Employment Number	Employment %	Value Added by By Manufacture Mil. $	Value Added %	Value of Shipments Mil. $	Value of Shipments %
Curtains & draperies	1,371	100.0%	24.1	100.0%	$ 442.1	100.0%	$1,062.0	100.0%
Plants with average employment of —								
1 - 19 employees	1,117	81.5	5.6	23.2	98.8	22.3	216.3	20.4
20 - 99 employees	212	15.5	8.8	36.5	154.9	35.0	365.7	34.4
100 or more employees	42	3.0	9.7	40.2	188.4	42.7	480.0	45.2
Home textiles, n.e.c.	958	100.0	49.3	100.0	1,249.0	100.0	3,262.2	100.0
Plants with average employment of —								
1 - 19 employees	559	58.4	3.5	7.1	98.0	7.8	249.9	7.7
20 - 99 employees	272	28.4	12.0	24.3	291.1	23.3	753.3	23.1
100 or more employees	127	13.2	33.8	68.6	859.9	68.9	2,259.0	69.2
Drapery hardware, blinds, shades	435	100.0	15.7	100.0	556.6	100.0	1,114.4	100.0
Plants with average employment of —								
1 - 19 employees	308	70.8	10.8	68.6	49.9	9.0	102.9	9.2
20 - 99 employees	95	21.8	3.7	23.6	107.9	19.4	231.6	20.8
100 or more employees	32	7.4	1.2	7.6	398.8	71.6	779.9	70.0

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, General Summary, Subject Series MC82-S-1 (Part 2)

GENERAL INDUSTRY STATISTICS

Location of the Industry

Industry Statistics For Leading States

	All Plants		All Employees		Value Added By Manufacture*	
	Total	With 20+ Employees	No. (thous.)	%	Mil. $	%
Industry						
Curtain & drapery	1,371	254	24.1	100.0%	$442.1	100.0%
Leading States						
California	319	43	3.3	13.7	57.5	13.0
Georgia	31	12	1.4	5.8	36.9	8.3
Massachusetts	51	29	2.8	11.6	53.6	12.1
New York	109	28	1.8	7.5	49.8	11.3
North Carolina	34	14	3.6	14.9	56.4	12.8
Texas	100	16	1.7	7.0	30.1	6.8
Home textiles, n.e.c.	958	399	49.3	100.0	1,249.0	100.0
Leading States						
Alabama	16	10	2.4	4.9	114.7	9.2
California	141	48	4.5	9.1	119.3	9.5
Georgia	45	28	4.0	8.1	109.1	8.7
New York	195	77	9.2	18.7	152.8	12.2
North Carolina	68	41	7.6	15.4	211.0	16.9
South Carolina	25	16	5.3	10.7	108.8	8.7
Drapery hardware, blinds, shades	435	127	15.7	100.0	557.6	100.0
Leading States						
California	57	20	2.6	16.6	77.1	13.8
New Jersey	23	9	1.5	9.5	50.8	9.1
New York	74	15	1.1	7.0	65.4	11.7
Texas	30	10	0.7	4.4	53.9	9.7

* For explanation of this value, see page 3. The total value of product shipments (all producers) by leading state is covered in the PRODUCT SHIPMENTS section.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census, 1982 Census of Manufactures
Industry Series MC82-1-23E, -1-25B

PRODUCTION

Summary of Production of Sheets, Pillowcases & Terry Towels: 1975-1985
(Thousands of dozens)

	Sheets				
Year	Crib	Flat	Fitted	Pillowcases	Terry Towels
1985	543	8,925	6,023	13,174	44,974
1984	653	10,149	6,324	15,147	46,954
1983	824	10,232	6,739	14,950	49,742
1982	642	8,937	5,908	12,382	41,117
1981	641	10,102	6,669	14,441	44,931
1980	694	9,932	6,599	14,694	43,957
1979	695	9,770	6,102	14,257	47,118
1978	659	10,310	6,494	13,727	44,976
1977	632	9,711	6,573	13,950	45,124
1976	732	9,836	6,968	13,964	45,556
1975	683	9,092	6,344	12,337	41,442

Source: U.S. Bureau of the Census,
Current Industrial Reports (MQ23X(85)-5

Figures on production of other types of home textiles are included in the annual report, Cotton Counts Its Customers, issued by the National Cotton Council of America.

Production of Selected Home Textiles by Type: 1984, 1985

	Unit of Measure	1985(p)	1984	% Change 1985/1984
Curtains, excluding shower	1,000 sets	120,300	120,214	+ 0.1%
Lace		2,398	2,098	+14.3
Other, principally woven		117,902	118,116	- 0.2
Cafe, tiered & cottage		63,667	65,443	- 2.7
Ruffled		5,895	6,212	- 5.1
Shortie drapes		12,969	12,324	+ 5.2
Tailored		35,371	34,137	+ 3.6
Drapery, upholstery & slip cover fabrics	1,000 lin. yds.	897,000	894,529	+ 0.3
Drapery fabrics		492,000	491,158	+ 0.2
Mainly woven		428,000	427,094	+ 0.2
Lining, woven		64,000	64,064	- 0.1
Upholstery & slip cover fabrics	1,000 lin. yds.	405,000	403,371	+ 0.4
Coated		56,700	60,506	- 6.3
Knit		15,876	16,942	- 6.3
Woven		40,824	43,564	- 6.3
Uncoated, woven		349,300	342,865	+ 1.9
Window shades, woven, plastic & nonwoven	1,000 units	23,695	23,005	+ 3.0
Wall covering fabric (woven & nonwoven)	1,000 sq. yds.	169,990	177,073	- 4.0

(continued)

Production of Selected Home Textiles by Type: 1984, 1985
(continued)

	Unit of Measure	1985(p)	1984	% Change 1985/1984
Slip covers, furniture, excluding plastic	1,000 sets	6,200	6,526	- 5.0%
Knit		4,959	5,221	- 5.0
Slip covers		1,983	2,088	- 5.0
Throw covers		2,976	3,133	- 5.0
Woven		1,241	1,305	- 4.9
Slip covers		112	562	- 80.1
Throw covers		595	117	+408.5
Sleep covers		534	626	- 14.7
Comforters & quilts, excluding filling	1,000 units	19,664	18,728	+ 5.0
Bedspreads	1,000 units	27,202	26,696	+ 1.9
Tailored		16,971	16,477	+ 3.0
Tufted		2,000	1,980	+ 1.0
Woven		8,231	8,239	- 0.1
Jacquard		3,189	3,254	- 2.0
Other woven		5,042	4,985	+ 1.1
Mattress coverings, woven & plastic	1,000 units	2,654	2,628	+ 1.0
Pads, quilted, excluding fillings	1,000 units	29,228	27,771	+ 5.2
Bassinet, crib & furniture, woven & plastic		5,340	5,235	+ 2.0
Mattress, woven		23,888	22,536	+ 6.0
Pillows & cushions, excluding fillings, woven	1,000 units	42,395	40,793	+ 3.9
Bed		22,576	21,918	+ 3.0
Decorative		19,819	18,875	+ 5.0
Textile table cloths, napkins & place mats, excluding plastic	1,000 sq. yds.	129,656	132,789	- 2.4
Damask		17,475	17,649	- 1.0
Lace		21,440	21,592	- 0.7
Other, woven		90,741	93,548	- 3.0
Coated		19,514	20,118	- 3.0
Uncoated		71,227	73,430	- 3.0

(continued)

Production of Selected Home Textiles by Type: 1984, 1985
(continued)

	Unit of Measure	1985(p)	1984	% Change 1984/1983
Blankets & blanketing	1,000 lin. yds.	85,573	84,754	+ 1.0%
Bed		78,727	77,126	+ 2.1
Thermal woven		25,980	23,909	+ 8.7
Cotton		7,364	5,260	+40.0
Other		18,616	18,649	- 0.2
Other woven & non-woven		52,747	53,217	- 0.9
Cotton & cotton blends		8,967	9,579	- 6.4
Other		43,780	43,638	+ 0.3
Crib & receiving		6,846	7,628	-10.2
Thermal woven		1,095	1,144	- 4.3
Cotton		164	172	- 4.6
Other		931	972	- 4.2
Other woven & non-woven		5,651	6,484	-11.3
Cotton & cotton blends		4,601	5,057	- 9.0
Other		1,150	1,427	-19.4

(p) preliminary

Source: National Cotton Council of America,
Cotton Counts Its Customers, 1986 Edition.

Materials Consumed in Production

The 1982 census of manufactures reports include the cost of materials consumed or put into production by plants classified in home textiles and related products industries for that year.

Materials Consumed By the Home Textiles & Related Products Industry, 1982

	Curtains & Draperies		Home Textiles, n.e.c.	
	Quantity	Delivered Cost (mil. $)	Quantity	Delivered Cost (mil. $)
Materials, supplies, total	--	$ 568.9	--	$1,849.5
Broad woven fabrics (mil. lin. yds.)				
Primarily --				
Cotton	38.5	42.0	203.4	262.7
Rayon & acetate	36.4	53.6	na	19.4
Nylon	na	1.8	na	6.1
Polyester	130.2	131.7	297.2	316.0
Other fabrics	50.7	69.9	154.5	166.1
Plastics coated, impregnated or laminated fabrics	--	--	na	22.9
Manmade fibers (staple & tow) (mil. lbs.)	--	--	48.3	40.4
Plastic products (sheets, rods, tubes, etc.)	--	--	--	21.5
All other materials, components, supplies	--	269.9	--	994.4

(continued)

PRODUCTION

Materials Consumed in Production

Materials Consumed By the Home Textiles & Related Products Industry, 1982
(continued)

	Drapery Hardware, Blinds, Shades	
	Quantity	Delivered Cost (mil. $)
Materials, supplies, total	--	$ 460.1
Mill shapes & forms:		
Steel	--	105.2
Aluminum & aluminum-base alloy	--	91.3
Plastic coated fabric & shade cloth (mil. lin. yds.)	27.7	42.6
Cordage (mil. lin. ft.)	466.6	8.0
Woven narrow tape & webbing (mil. lin. ft.)	170.8	13.7
Plastic sheets, rods, tubes, etc.	--	41.4
All other materials, components, supplies	--	157.9

n.e.c. not elsewhere classified
na not available

Source: U.S. Bureau of the Census, 1982 Census of Manufactures
Industry Series MC82-1-23E, 1-25B

Fibers

There has been a definite swing on the part of consumers toward natural fibers, and cotton's share of the U.S. market for home textiles increased in 1985 as mills promoted all-cotton products or higher cotton blend levels. Cotton has also become more competitively priced. In 1980, cotton cost 27% more than polyester; in 1985 it cost only 6% more due to large supplies and cost-saving innovations developed by planter-shippers. Now, new farm legislation, increasing U.S. government price supports for U.S. growers as of August 1, 1986, is expected to reduce costs for domestically produced cotton to world levels, effectively reducing its price from the current 56 cents a pound to the mid 40's or less.

This is expected to have a great effect on home textiles, particularly on the fiber blend levels to be introduced by major sheet mills in 1987. Polyester, the man-made fiber blended so often with cotton in home textiles, and as of June 1986 priced at about 63 cents, will be under some additional price pressure. While all-cotton sheets and cotton-rich blends have had a strong share of the upscale market, the mass market will be able to trade up to cotton when the new price structure becomes effective. The polyester fiber interests, on the other hand, can be expected to strongly promote the specific advantages offered by this fiber. The problems of the polyester fiber suppliers are, however, compounded by the consolidation of the mills which are already in the process of redefining their markets and their suppliers.

PRODUCTION

Materials Consumed in Production

Fibers (continued)

The Textile Economics Bureau Inc. compiles an annual report on fiber consumption by end-use markets, which is published in the September issue of Textile Organon, and in the Man-Made Fiber Producers' Handbook. At the date of the compilation of this Fact File, the latest figures available are for the year 1984.

Fiber Consumption in Specified Home Textiles, 1980, 1984

	1984		1980	
	Mil. Pounds	Percent	Mil. Pounds	Percent
Bedspreads, quilts (1)	129.3	100.0%	128.2	100.0%
Man-made fibers	81.2	62.8	73.0	56.9
Cellulosic	10.0	7.7	7.5	5.8
Noncellulosic	71.2	55.1	65.5	51.1
Cotton	48.1	37.2	55.2	43.1
Blankets & blanketing (2)	67.0	100.0	109.1	100.0
Man-made fibers	50.9	76.0	97.2	89.1
Cellulosic	0.2	0.3	2.0	1.8
Noncellulosic	50.7	75.7	95.2	87.3
Cotton	11.1	16.6	7.9	7.2
Wool	5.0	7.5	4.0	3.7
Sheets & other bedding (3)	516.8	100.0	507.9	100.0
Man-made fibers	300.0	58.0	263.8	51.9
Cellulosic	15.5	3.0	11.7	2.3
Noncellulosic	284.5	55.0	252.1	49.6
Cotton	216.8	42.0	244.1	48.1
Towels & toweling (4)	361.5	100.0	328.5	100.0
Man-made fibers	30.3	8.4	35.3	10.7
Cellulosic	0.7	0.2	0.9	0.3
Noncellulosic	29.6	8.2	34.4	10.4
Cotton	331.2	91.6	293.2	100.0
Curtains (5)	100.8	100.0	89.5	30.5
Man-made fibers	91.2	90.5	80.1	27.3
Cellulosic	10.8	10.7	11.5	3.9
Noncellulosic	80.4	79.8	68.6	23.4
Cotton	9.6	9.5	9.4	3.2
Drapery & Upholstery (6)	500.0	100.0	487.9	100.0
Man-made fibers	327.8	65.5	328.8	67.4
Cellulosic	92.7	18.5	128.5	26.3
Noncellulosic	235.1	47.0	200.3	41.1
Cotton	155.9	31.2	147.7	30.3
Wool	16.3	3.3	11.4	2.3

(footnotes continued)

PRODUCTION

Materials Consumed in Production

Fibers (continued)

Note: Noncellulosic yarn includes textile glass.
(1) Includes tailored and throw spreads, both tufted and woven, as well as backing; comforters and their outer shell.
(2) Woven, knitted, needle-punched and flocked full-size and crib blankets, electric blanket shells, as well as bindings.
(3) Includes sheets and pillowcases; also outside cover of quilted pads, mattress pads, mattresses and springs, civilian cots and sleeping bags.
(4) Woven hand, bath, dish towels, etc. Nonwoven towels are not included.
(5) Lace and other types of cafe, tiered, cottage, etc. curtains.
(6) Includes furniture slipcovers and vinyl coated cotton fabrics for upholstery, as well as drapery fabrics, backing and headers.

Source: Textile Economics Bureau, Inc.:
Textile Organon (Sept. 1985)

PRODUCT SHIPMENTS

Data on industry shipments, as previously noted, cover the value of primary products shipped by manufacturers in the industry classification plus the value of secondary products, contract work and miscellaneous receipts. Product shipments, however, as reported by the Census Bureau cover the value of specific products by all manufacturers, regardless of their industry classification based on their primary product.

Data from the 1982 census of manufactures and the 1983 annual survey of manufactures provide the most detailed information currently available on all types of home textiles and related products. In addition, the Census Bureau's Current Industrial Reports series provides quarterly and annual reports on production and shipments of sheets, pillowcases and towels, covering all manufacturers in the U.S.

Quality & Value of Shipments of Sheets & Pillowcases by U.S. Mills: 1984, 1985

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Sheets & pillowcases	29,297	31,493	$1,184.8	$1,232.6
Crib size	559	637	18.4	20.6
Sheets, excluding crib	15,261	16,218	918.3	948.5
Flat sheets	9,019	9,906	550.1	581.4
Fitted sheets	6,242	6,312	368.2	367.1
Thread count:				
195 & over	817	603	78.3	54.0
180 to 194	7,192	7,383	461.4	475.9
135 to 179	1,283	1,488	78.0	92.8
125 to 134	2,457	2,761	127.3	137.1
Under 125	3,512	3,983	173.3	188.8

(continued)

Quality & Value of Shipments of Sheets & Pillowcases by U.S. Mills: 1984, 1985
(continued)

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Sheets & pillowcases (cont'd.)				
Fabric:				
Polyester/cotton blends	14,430	15,808	$ 837.4	$ 910.8
Other fabrics	831	410	80.9	37.7
Size:				
King	1,627	1,649	151.2	153.5
Queen	3,069	3,171	223.8	229.1
Full	4,789	5,651	276.9	305.7
Twin	5,199	5,400	246.1	246.3
Single & smaller	577	347	20.3	14.0
Flannel sheets	559	nr	32.2	nr
Pillowcases	13,477	14,638	248.1	263.6
Thread count:				
195 & over	723	538	25.9	19.3
180 to 194	6,500	6,855	131.4	133.6
Under 180	6,254	7,245	90.8	110.7
Fabric:				
Polyester/cotton blends	12,726	14,303	220.5	250.4
Other fabrics	751	335	27.6	13.1
Special Counts				
Branded retail shipments of sheets & pillowcases (except crib)	18,067	20,560	790.3	841.8
Upstairs brand	7,991	8,403	423.5	415.4
Open brand	10,076	12,157	366.8	426.4
Sheet sets (excluding water bed)	2,411	2,409	356.4	351.3
Waterbed sheet sets	174	129	28.8	34.9

nr not reported

Source: U.S. Bureau of the Census, *Current Industrial Reports* MQ23X(85)-5

As indicated in the above table, 1985 was not a good year for sheet and pillowcase mills, as a whole. Unit shipments declined almost 7% compared with 1984, and value of shipments (current dollars) went down 2.9%. One of the few bright spots was in shipments of high-count (195 and over) sheets, up 35% in quantity of shipments and 45% in value in 1985 compared with 1984, and in other than polyester/cotton blend sheets and pillowcases -- mainly all cotton. In 1985 the quantity of sheets in this classification was more than double the quantity shipped in 1984; the value of shipments was up 115%.

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Terry Towels & Bath Mats By U.S. Mills: 1984, 1985

	Quantity (thous. dozens)		Value (millions of $)	
	1985	1984	1985	1984
Finished terry towels	46,129	46,735	$ 918.5	$ 944.8
Type:				
Sheared	9,708	15,613	213.6	297.7
Nonsheared	36,421	31,122	704.8	647.1
End use:				
Kitchen	6,428	7,653	42.1	56.7
Bath	21,424	20,138	528.6	559.1
Hand, guest, etc.	16,015	16,364	253.2	226.1
Bath/tub mats	656	621	23.2	24.0
Other (queen/king size, bath sheets, beach towels, bath mats)	1,606	1,959	71.3	79.0
Terry towels sold for further processing elsewhere (e.g., blanks)	6,368	6,184	72.9	95.5
Terry washcloths	22,127	22,601	130.0	123.9
Special summary date on towels:				
Branded retail shipments of towels & washcloths	32,128	31,890	535.5	533.1
Upstairs brand	7,322	6,636	187.8	161.4
Open brand	24,806	25,254	347.7	371.7
Huck & crash towels	23,691	21,498	20.5	16.4
Other terry products:				
Terry cloth sold by the yard* (yards)	13,404	15,948	26.5	29.5
Pot holders, aprons, dishcloths, etc.	6,302	4,933	26.4	33.4
Scatter rugs (tufted), bathmats, etc.	62,598**	72,454**	318.3	313.6

* To the extent that this yardage is fabricated into towels and washcloths, there is duplication in the figures.

** In thousands of square yards.

Source: U.S. Bureau of the Census, Current Industrial Reports, MQ23X(85)-5

Shipments of finished terry towels by U.S. mills in 1985 registered a decline of 1.3% in quantity and 2.8% in value compared with 1984. Nonsheared terry towels fared best, with quantity of shipments gaining 17%, value up 8.9%. Huck and crash towel shipments also registered a gain last year.

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Sheets, Pillowcases & Terry Towels By Distribution Channel: 1985

	Total	Branded Retail*	Private Ticket Retail**	Export***	Institutional & Other#
Sheets (except crib)					
Less than 180 count:					
Quantity	100.0%	70.5%	11.8	6.7	11.0
Value	100.0	72.1	12.4	5.5	10.0
180 count & greater					
Quantity	100.0	58.7	19.8	2.7	18.8
Value	100.0	63.7	16.5	2.8	17.0
Pillowcases					
Quantity	100.0	61.2	16.9	6.5	15.4
Value	100.0	70.0	14.7	4.5	10.8
Terry towels					
Quantity	100.0	46.8	14.5	1.4	37.3
Value	100.0	50.0	23.1	1.9	25.0
Washcloths, terry					
Quantity	100.0	47.7	12.4	1.2	38.7
Value	100.0	58.5	16.1	2.1	23.3

* Branded retail: sales of company brands including premium goods, drops (closeouts) and seconds sold to domestic consumers through all types of retailers.

** Private ticket retail: sales with retail identification -- with or without a manufacturer's corporate identification but not with a manufacturer's brand name.

*** Exports: includes only direct company shipments for export, not export shipments handled through jobbers or distributors.

Institutional & other: includes domestic distribution only, and includes all Federal and State contract business, commercial accounts (hotels, etc.) which are sold on a contract basis, and shipments to dealers who are involved in resale to the institutional trade.

Source: U.S. Bureau of the Census, *Current Industrial Reports* MQ23X(85)-5

PRODUCT SHIPMENTS

Quantity & Value of Sheets & Towels By Type of Finish: 1985
(Percent distribution)

	Total	White	Solid Colors	Fancies
Sheets				
Crib				
Quantity	100.0%	39.2	5.4	55.4
Value	100.0	35.9	6.2	57.9
Other				
Quantity	100.0	15.2	23.0	61.7
Value	100.0	15.0	24.2	60.8
Terry Towels				
Quantity	100.0	28.1	46.8	25.0
Value	100.0	22.5	55.7	21.8

Source: U.S. Bureau of the Census,
Current Industrial Reports MQ23X(85)-5

Detailed information on product shipments is covered in the reports based on the 1982 census of manufactures, including home textiles and related products not covered in Current Industrial Reports. Following is information from the census on specified products compared with 1977 census results where reported.

Value of Shipments of Home Textiles & Related Products
By All U.S. Producers: 1977, 1982
(Millions of dollars)

	1982	1977
Bedspreads and bedsets	$ 402.8	$ 400.3
Made from purchased fabric	331.4	nr
Made in weaving mills	71.4	nr
Types:		
Tailored, quilted	178.5	nr
Wholly or chiefly cotton fabric	56.7	nr
Wholly or chiefly manmade fiber fabric	121.8	nr
Tailored, nonquilted	17.1	nr
Wholly or chiefly cotton fabric	9.2	nr
Wholly or chiefly manmade fiber fabric	7.9	nr
Nontailored, tufted	6.2	nr
Nontailored, not tufted	141.1	nr
Wholly or chiefly cotton fabric	55.7	nr
Wholly or chiefly manmade fiber fabric	85.4	nr
Type not specified	34.8	nr
Sheets and pillowcases	1,156.3	906.3*
Made from purchased fabric	677.6	479.5
Made in weaving mills		
Chiefly cotton	nr	nr
Chiefly manmade fiber		
100% spun	283.1	426.8
100% filament	nr	

(continued)

Value of Shipments of Home Textiles & Related Products By All U.S. Producers: 1977, 1982

(Millions of dollars)
(continued)

	1982	1977
Towels and washcloths	$ 964.0	$ 693.0
Made from purchased fabric	355.9	276.6
Made in weaving mills (chiefly cotton)	608.1	416.4
Blankets, woven	181.3	nr
Made from purchased fabric	102.7	nr
Made in weaving mills	78.6	nr
Size:		
Adult	124.2	nr
Crib	57.1	nr
Blankets, nonwoven fabrics	89.6	102.0
Curtains & draperies, except lace	1,008.3	936.7
Window curtains	289.5	233.8
Wholly or chiefly cotton	58.2	45.6
Wholly or chiefly manmade fiber fabrics	205.7	170.5
Other materials, including plastic	25.6	17.7
Draperies (all lengths)	840.6	439.6
Wholly or chiefly cotton	82.1	127.3
Wholly or chiefly manmade fiber fabrics	279.6	285.7
Other materials, including plastic	58.6	26.6
Curtains & draperies, type not specified	298.5	263.3
Shower bath curtains, including plastics, coated fabrics and all other	125.5	885.7
Quilted products, except bedspreads:		
Comforters (bed)	196.7	81.6
Convertible sleeping bags	8.5	
Mattress protectors	79.7	76.6
Other, including wadded quilts and baby pads	23.4	18.7
Tablecloths		
Plastics or plastics coated or laminated	43.8	46.6
All other	90.5	57.2
Napkins	38.8	24.5
Place mats and sets, including plastics	34.6	17.8
Other related articles except lace (dresser covers, scarfs, bridge sets, doilies, etc.)	17.5	21.3
Bed pillows:		
Foam rubber & other materials	213.5	108.7
Fancy pillows & cushions		
Foam rubber	31.6	21.5
Other materials	96.9	64.2
Slip covers		
Furniture (fabric, plastics, other)	19.7	55.5
Mattress	7.3	18.5
Other	9.7	6.8
Bags (laundry, wardrobe, shoe, storage)	30.5	21.4

(continued)

PRODUCT SHIPMENTS

Value of Shipments of Home Textiles & Related Products By All U.S. Producers: 1977, 1982
(Millions of dollars)
(continued)

	1982	1977
Window coverings, other than curtains & draperies		
Shades & accessories	$ 181.0	$ 140.3
Plastic window shades	108.4	63.0
Other window shades	54.1	48.6
Shade accessories & rollers sold separately	9.6	18.7
Window shades & accessories, type not specified	9.0	10.0
Venetian blinds	406.5	99.0
Complete venetian blinds, vertical & horizontal		
Aluminum slat blinds	245.4	52.3
Other, wood, plastics, etc.	84.8	nr
Unassembled venetian blinds, parts, components, etc.	70.7	nr
Venetian blinds, type not specified	5.7	13.0
Other shades and blinds, curtain and drapery rods, other hardware	301.8	320.3
Shades, blinds, hardware, etc., type not specified	111.9	55.7

* Data for 1977 on sheets and pillowcases is not exactly comparable to 1982 information.

nr not reported

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series, MC82-1-23E

For certain broad product categories, the Census Bureau has compiled data on value of shipments for the year 1983, comparable to 1982 figures.

Value of Shipments By All U.S. Producers: 1982, 1983
(Millions of dollars)

	1983	1982	% Change 1983/1982
Total reported	$6,670.9	$5,978.6	+ 11.6%
Curtains and draperies, except lace	1,058.6	1,008.3	+ 5.0
Sheets and pillowcases, made from purchased fabric	775.5	677.6	+ 14.4
Towels and washcloths, made from purchased fabric	423.0	355.9	+ 18.8
Other home textiles & type not specified	2,038.2	1,934.4	+ 5.4
Drapery hardware, blinds, shades	1,187.8	1,001.2	+ 18.6
Window shades & accessories	215.6	181.0	+ 19.1
Venetian blinds	516.0	406.5	+ 26.9
Other shades, blinds; curtain & drapery hardware	353.5	301.8	+ 17.1
Shades, blinds, hardware, type not specified	102.7	111.9	- 8.2

Source: U.S. Bureau of the Census, 1983 Annual Survey of Manufactures M83(AS)-2

PRODUCT SHIPMENTS

Unit sales of conventional blankets by U.S. mills have been reported as follows:

Conventional Blankets
Domestic Mill Unit Sales, 1978-1984

Year	Millions of Units
1978	37.6
1979	36.5
1980	36.3
1981	28.8
1982	28.2
1983	26.5
1984	25.8

Source: Home Fashions Textiles (January 1986)

Concentration of Product Shipments

Share of Total Value of Shipments of Specified Products Accounted For By the Largest Companies: 1977, 1982

	Shipments (mil. $)	Percent of shipments accounted for by the largest companies:			
		Top 4	Top 8	Top 20	Top 50
Curtains & draperies, exc. lace					
1982	$1,008.3	20%	32%	45%	59%
1977	936.7	25	35	47	59
Bedspreads, bedsets made from purchased fabric					
1982	331.4	28	44	72	93
1977	300.4	29	45	71	92
Window shades & accessories					
1982	181.0	57	76	91	98
1977	140.3	72	83	91	98
Venetian blinds					
1982	406.5	62	73	84	95
1977	89.6	68	78	89	97
Other shades, blinds; rods, poles, etc.					
1982	301.8	71	85	95	99+
1977	329.7	68	78	89	97

Source: U.S. Bureau of the Census, 1982 Census of Manufactures Concentration Ratios in Manufacturing Subject Series: MC82-S-7

PRODUCT SHIPMENTS

Leading States

Share of Total Shipments of Specified Products Accounted for By Producers in Leading States, 1982

(Value in millions of dollars)

	Value	Percent
Bedspreads, bedsets made from purchased fabrics	$ 331.4	100.0%
California	32.2	9.7
Georgia	52.3	15.8
New York	78.7	23.7
North Carolina	62.8	18.9
South Carolina	31.8	9.6
Home textiles not elsewhere classified*	1,477.6	100.0
California	186.9	12.6
Georgia	95.2	6.4
Illinois	99.9	6.8
Massachusetts	39.7	2.7
New Jersey	123.4	8.4
New York	165.5	11.2
North Carolina	221.4	15.0
Ohio	55.0	3.7
Pennsylvania	68.2	4.6
South Carolina	73.9	5.0
Texas	49.1	3.3
Window shades and accessories	181.0	100.0
California	11.4	6.3
Florida	5.6	1.1
Indiana	11.2	10.9
New Jersey	7.0	3.4
New York	20.7	11.4
Venetian blinds	406.5	100.0
California	89.1	21.9
Florida	14.1	3.5
Georgia	22.2	5.5
New Jersey	58.8	14.5
Texas	40.8	10.0

* Does not include sheets, pillowcases, towels and washcloths made from purchased fabric.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures, Industry Series MC82

FOREIGN TRADE

Imports

Imports of textile home goods have not registered a major impact on the U.S. market comparable to developments in apparel. The primary difference between the two segments is that unlike apparel production home textiles production is not labor-intensive. Curtains, draperies, sheets and bedspreads require less cutting and sewing -- major factors in labor costs which have fostered the tremendous jump in imports of apparel. In addition, shipping of comforters, bedspreads, pillows and other finished products is expensive due to the bulk and density of these items.

However, imports have been growing, particularly imports of all-cotton home textiles. According to the U.S. International Trade Commission, U.S. imports of bedding (i.e. sheets, pillowcases, blankets, bedspreads, comforters and quilts) totaled $166 million in 1985, representing a 45% gain over the 1984 total. A large part of the increase was in sheets and pillowcases, imports of which rose by almost 50% to $90.2 million. Imports of blankets increased by 29% to $42.5 million. Imports of bedspreads, comforters and quilts rose by 60% to $33.4 million. Increasingly tighter quotas on other textile products and the growing popularity of cotton flannel sheets contributed importantly to the growth of these imports.

During 1985, import surges prompted the United States to issue "calls" to establish quotas on cotton sheets from Brazil, China, Israel, Portugal and Taiwan, and on cotton pillowcases from China, Portugal, Taiwan, and Hong Kong.

The Census Bureau reports that imports of sheets and pillowcases accounted for 7.9% of the U.S. market in terms of value in 1985, up from 5.6% in 1984, 2.0% in 1983. In the U.S. terry towel market, imported merchandise's share was 15.4% last year, up from 14.3% in 1984, and 10% in 1983.

With consolidations completed in the past year in the home textiles industry, U.S. mills can be expected to become even more competitive with imports. Vertical weaving operations and upgraded equipment will be utilized to counter imports that offer a threat to product lines. U.S. domestics mills are now producing their own 100% cotton and polyester/cotton blend flannels to compete with the influx of imports. A weaker U.S. dollar may also help slow down the growth of imports.

Figures reported in 1985 indicated that about 5% of all curtain, drapery and matching bedcoverings fabrics are imported; and 16% of all types of towels. Most of the towel imports are for institutional use -- a market which is said to account for some 36% of all towels sold in the U.S. Imports in the curtain, drapery and bedspread area are mostly in the form of fabrics, cut and sewn. Most imports for window coverings are sheer fabrics, particularly voiles.

Brazil and China are leading sources of towel imports. Brazilian imports generally enter the retail market through American distributors, while Chinese imports are generally consigned to institutions (hotels, motels, hospitals) because of their lower price and quality. Upgraded quality and better styling is now found in Chinese products; towels from this source have been on the increase.

Flannel sheet imports, which now have competition from the U.S. product, come mainly from Belgium, Brazil, Portugal and West Germany, and also from England and Israel.

Imports of Specified Home Textiles For Consumption in the U.S., 1983-1985

	C.I.F. Value (thousands)* 1985	1984	1982	% Change 1985/1983
Sheets, pillowcases, quilts, spreads & other home textiles n.e.c.	$576,848	$438,544	$292,200	+ 97.4%
Blankets, including electric blankets throws, etc.	40,220	30,383	14,817	+171.4

* The c.i.f. value includes the Customs valuation of the product plus all freight, insurance, and other charges (excluding U.S. import duties) incurred in bringing the merchandise to the first port of arrival in the U.S.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census: U.S. General Imports & Imports for Consumption FT135

Total Supply

Shipments, Exports, Imports & Apparent Consumption of Sheets, Pillowcases and Terry Towels, 1985

(Quantity in thousands of dozens; value in thousands of dollars)

	Sheets & Pillowcases		Terry Towels	
	Quantity	Value	Quantity	Value
Manufacturers' shipments	29,297	$1,184,751*	46,129	$ 918,457*
Exports of domestic products	633		492	
Value at port		45,365		20,650
Producers' value (estimated)**		40,987		18,658
Percent exports to mfrs. shipments	2.2%	3.5%	1.1%	2.0%
Imports for consumption	2,243	97,445***	17,461	164,005***
Apparent consumption #	30,907	1,241,209	63,098	1,063,804
Percent imports to apparent consumption	7.3%	7.9%	27.7%	15.4%

* Value f.o.b. plant.

** Value adjusted to exclude freight, insurance and other charges incurred in moving goods to port of export. This adjustment is made to connect the values to an approximation of the producers' value of exported goods.

*** Imports equal cost, insurance and freight (c.i.f.) value plus calculated import duty.

# Apparent consumption represents new domestic supply, derived by subtracting exports from the value of manufacturers' shipments plus imports.

Source: U.S. Bureau of the Census, Current Industrial Reports Sheets, Pillowcases, and Towels MQ23X(85)-5

FOREIGN TRADE

U.S. Imports & Exports of Curtains & Draperies, Textile Furnishings

	1985	1984	1983	% Change 1985/1984
Curtains & draperies				
Imports:				
Quantity (thous. lbs.)	5,202	2,528	1,841	+ 106
Value (thous. $)	$ 33,861	$ 20,867	$ 15,008	+ 62
Exports:				
Quantity (thous. lbs.)	1,895	2,003	1,592	- 5
Value (thous. $)	$ 8,818	$ 11,536	$ 13,581	- 24
Textile furnishings except floor coverings & curtains, draperies				
Imports:				
Value (thous. $)	$547,755	$416,582	$273,160	+ 31
Exports:				
Value (thous. $)	88,504	98,089	114,955	- 10

Source: U.S. International Trade Commission:
U.S. Trade Shifts in Selected Commodity Areas (Annual 1985)
USITC Publication 1864

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

Households

The household population, and particularly the formation of new households, are counts of importance in estimating the size of the markets for household products. In 1984, according to the U.S. Census Bureau, there were 86.8 million U.S. households, compared with 85.2 million in 1984, and 80.8 million in 1980.

The annual growth rate for U.S. households is expected to decline over the next 15 years. Projections just completed by the Bureau indicate a growth by the year 2000 of 18 to 27%, to between 102.4 and 110.2 million households. Between 1970 and 1985, households increased by 37%.

Household Expenditures For Home Textiles

An ongoing survey covering consumer expenditure patterns is compiled by the U.S. Bureau of Labor Statistics. Reports cover average expenditures for major product classifications by urban households (referred to as consumer units in the BLS reports), and averages are reported in terms of the "householder" -- defined as the first member of the consumer unit mentioned as an owner or renter (maintainer) of the premises at the time of the initial interview.

The averages are based on all households or consumer units, including both those purchasing the designated product and non-purchasers, and are therefore lower than the average expenditure for just those households making a purchase.

Projections of BLS survey data for 1980-1982 indicated that households with a householder (head) age 25-34 accounted for 25.5% of total purchases of home textiles (including bathroom, bedroom, kitchen, dining room and other linens, curtains and draperies, slipcovers, decorative pillows and sewing materials). The second largest share of spending was held by households with head age 35 to 44 years.

THE POTENTIAL MARKET

Household Expenditures For Home Textiles

Percent of Reported Home Textiles Expenditures by Age of Householder 1980-1981

	Total	Under 25	25-34	35-44	45-54	55-64	65 & Over
Purchases of household textiles	100.0%	5.6	25.5	21.2	17.3	18.6	11.8
For own use	100.0	5.8	26.6	22.1	17.1	16.8	11.6
For gifts	100.0	3.2	13.9	12.4	18.9	37.1	14.4

Source: Based on BLS Consumer Expenditure Survey 1980-81

Following are the average expenditures among urban households (totaling 72.5 million) in 1983, based on age of householder and household income.

Annual Expenditures For Home Textiles Among Urban Consumer Units, 1983
(Number of households in thousands)

By Age of Householder:	Under 25	25-34	35-44	45-54	55-64	65 & Over	All Consumer Units
Number of households	7,186	17,606	13,385	10,033	10,242	14,079	72,531
Average expenditure for home textiles	$ 80	$ 35	$ 72	$ 94	$ 111	$ 87	$ 75

By Income before taxes	Less than $5,000	$5,000-9,999	$10,000-14,999	$15,000-19,999	$20,000-29,999	$30,000-39,999	$40,000 & over
Number of households*	7,127	10,600	8,707	7,460	11,881	7,735	9,826
Average expenditures for home textiles	$ 23	$ 41	$ 51	$ 57	$ 76	$ 104	$ 207

* Totals 63,335,000 reporting income.

Source: Bureau of Labor Statistics,
Consumer Expenditure Survey: Interviews, 1982, 1983

RETAIL SALES BY STORE TYPE

Every five years the U.S. Department of Commerce, Bureau of the Census, conducts a complete census of business, including retail trade, in the U.S. The most recent, covering operations in 1982, showed sales of the entire domestics category (including window coverings and related hard goods products) through all types of retail outlets with one or more paid employees amounted to close to $9.0. Included in this classification were sheets, blankets, table coverings, towels, curtains and draperies, shades, venetian blinds and related merchandise. Ready-made products, as well as made-to-order merchandise and fabrics are also included in the Census Bureau sales figure. (The current value at retail is estimated at $12.0 billion.)

RETAIL SALES BY STORE TYPE

Well over half of reported sales (55.7%) were accounted for by department stores, which accounted for only 14.9% of the outlets (establishments) selling the reported types of merchandise.

Curtain, Drapery, Domestics, Window Coverings Sales By Major Retail Outlet Type: 1982

	Establishments		Sales by Outlet Type	
	Number	Percent	Thous. $	Percent
Home textiles & related merchandise Reported total	65,350	100.0%	$8,926,133	100.0%
Outlet Type:				
General merchandise stores, total	27,560	42.2	5,760,222	64.5
Department stores*	9,271	14.9	4,972,164	55.7
Variety stores	9,986	15.3	477,871	5.4
Misc. general mdse. stores	7,853	12.0	310,187	3.5
Furniture, homefurnishings stores, total	18,537	28.4	1,870,116	21.0
Furniture stores	8,791	13.4	238,675	2.7
Drapery, curtain, upholstery stores	4,063	6.2	723,066	8.1
Misc. homefurnishings stores	3,524	5.4	812,964	10.2
Nonstore retailers:				
Mail order houses	3,265	5.0	556,300	6.2
Direct selling establishments	966	1.5	120,270	1.3
Other retailers	15,022	23.0	619,225	6.9

* Sales from catalog order desks within the stores are included. Leased department operations, however, are not included. These are counted as separate stores in their applicable specialty. Department stores include discount department stores as well as conventional department stores, and the department store outlets of national catalog chains.

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade (RC82-1-3)

Since 1982 there have been major developments in retail distribution in all types of merchandise and particularly in home textiles. Competition has intensified with the emergence of new outlet types; aggressive price-cutting operations have come and gone.

Warehouse Clubs

Warehouse, or wholesale membership clubs, have become an increasingly important factor in the retailing of home textiles. Total volume (all merchandise) of these operators is currently pegged at about $4 billion, and this is expected to grow to $20 billion by 1990. According to Home Fashions Textiles (March 1986), home textiles account for 5%, on average of the $60-$100 million in sales that a single warehouse club generates. Average stock turns -- 15 to 18 times a year overall and 12 times a year in textiles -- are unheard of in any other retail channel. They offer competition to all levels of retailing -- from discounters to department stores, providing a growing market which upscale mills cannot ignore.

Warehouse Clubs (continued)

Although the clubs are primarily wholesalers to small business operations who pay a $25 annual membership fee, retail consumers can also join through membership in eligible organizations and by paying a 5% premium over the wholesale prices. These consumer members are said to account for about half of the warehouse clubs' volume

The breadth of the warehouse club's assortment in home textiles is limited, and likely to remain so. Nevertheless, to an increasing extent they are handling higher-priced, better quality goods and have the buying power to obtain the better brands. It is expected that they will become a growing source of competition for department stores, as well as for discounters/mass merchadisers.

Off-Price Chains

Off-price linen and domestics chains, which mushroomed three years ago, now appear to be in a shakeout period, as department stores have become more promotional and this competition is added to that faced by the chains from discounters and warehouse clubs. Price differentiation between the off-price chains and their aggressive competitors has diminished; and they can no longer rely on odd assortments, overruns, etc., sold at cut prices to hold their own in the marketplace.

Three years ago, three of the giant, publicly-owned shoe companies each took the off-price home textiles plunge. Melville Corp. acquired the 50-unit chain Linens 'n Things; U.S. Shoe expanded its nine-store Home Front, as did the Brown Group with its six-unit All-in-One chain. But early in 1986, U.S. Shoe announced plans to close a third of its 90 Home Front stores and leased departments; Melville Corp. was reported to be experiencing declines in sales at the 116-unit Linens 'n Things; and the Brown Group decided to get out of off-pricing in its newly-renamed 35-store Linen Center in favor of upgraded merchandise.

However, some of the privately-held regional off-price chains, particularly Leejay Bed and Bath, Norwood, Mass., and Stroug's Linen Warehouse, Pasadena, Calif., are reported to be profitable and expanding. Both of these, however, are in the high end of the market.

Licensing

Licensing, involving designer or character/personality names, has changed the competitive nature of domestics retailing in recent years. For department stores, a few strong designer names, such as Laura Ashley and Ralph Lauren -- which involve lines designed specifically for home textiles -- have generated increased volume, better margins, coordinated lines and exclusivity. Offering great patterns, colors and designs, rather than just a name, the successful designer lines have been coordinated in products for bedroom, bath and kitchen. Sales of Laura Ashley products are expected to hit $100 million in 1986, and have helped propel Stevens' share of the department store market from 20% to 60%.

Licensing (continued)

In contrast, department stores' reliance on apparel designer names, which were not specifically related to homefurnishings, the rapid proliferation of these names, the lack of exclusivity, and the short life of the designs have been blamed for many of the industry's problems in recent years, as stores were increasingly forced to compete on a price basis and as inventories accumulated.

Character-licensed goods were the discounters' strong seller in past years, but have now become primarily loss leaders under price competition offered by the chains. Most sellers, according to trade reports, are now forced to absorb the additional 10% to 15% royalty cost for a licensed line.

Department Stores

According to the 1982 census of retail trade, compiled by the U.S. Census Bureau, department stores accounted for almost 56% of total retail sales of home textiles that year. The market share of department stores has declined in recent years, under the strong price competition offered by discounters, mass merchandisers, off-price chains and warehouse clubs. However, they maintain the biggest share of the market for better-price, quality merchandise.

In 1982, there was a total of 9,981 department stores operating in the U.S. Of these, 9,069 reported sales of window coverings (ready-made, custom-made), slipcovers and fabrics, shades and blinds. Sales of domestics (towels, sheets, table linens, etc.) were reported by 9,688 department stores.

Department Store Sales of Home Textiles & Related Products, 1982

	No. of Stores	Mil. $	Sales of specified mdse. lines % of total sales of -- Stores handling line	All stores
Home textiles & related products, total	9,721	$4,972.2	5.1%	5.0%
Window treatment products, furniture covers	9,069	1,394.9	1.5	1.4
Domestics	9,688	3,577.2	3.7	3.6

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade Industry Series, RC81-1-3

Typical operating ratios in home textile and related product departments of department stores are compiled annually by the Controllers' Congress, National Retail Merchants Association. Following are typical (median) figures for 1984.

Department Stores (continued)

Merchandising & Operating Results of Specified Home Textiles In Department Stores With Sales Over $1 Million, 1984

(Median results)

	Total Upstairs Store (107)*	Domestics, Draperies & Home Goods (101)*	Custom Draperies & Slipcovers (22)	Bath Shop (31)
Net sales, % change from last year	+ 8.5	+ .9	7.2	7.0
Sales, % to total store	93.9	5.2	.5	.3
Sales, % to total division	--	100.0	9.7	6.8
Gross margin, % of sales (including cash discounts)	41.2	40.6	44.4	46.7
Markdowns, % to sales	18.8	13.0	6.6	10.2
Sales promotion, % to sales	3.1	4.6	--	4.7
Number of stock turns (times)	2.7	1.8	5.8	1.7
$ sales per sq. ft. of selling space (main or largest selling unit)	$127.0	$ 75.6	--	$57.0

	Linens & Domestics (90)*	Sheets & Pillowcases (51)*	Blankets, Comforters & Bed Pillows (52)	Table Linens & Other Table Coverings (49)
Net sales, % change from last year	+ 4.1	+ 2.7	+ 4.7	+ 3.8
Sales, % to total store	3.6	.8	.9	.8
Sales, % to total division	70.6	12.5	17.7	16.2
Gross margin, % of sales (including cash discounts)	40.1	43.5	+ 1.3	38.6
Markdowns, % to sales	13.3	14.8	13.6	13.5
Sales promotion, % to sales	4.6	4.8	6.3	4.9
Number of stock turns (times)	1.8	1.8	1.9	1.6
$ sales per sq. ft. of selling space (main or largest selling unit)	$ 83.6	$124.7	$130.6	$ 68.3

	Towels (50)	Window & Furniture Coverings (57)
Net sales, % change from last year	+ 4.1	4.8
Sales, % to total store	.9	.9
Sales, % to total division	17.5	17.8
Gross margin, % of sales (including cash discounts)	43.3	42.1
Markdowns, % to sales	12.1	12.4
Sales promotion, % to sales	3.7	4.9
Number of stock turns (times)	1.8	1.6
$ sales per sq. ft. of selling space (main or largest selling unit)	89.6	$47.8

* Number in parenthesis represents the number of stores reporting in each category.

Source: National Retail Merchants Association, Merchandising & Operating Results of 1984

RETAIL SALES BY STORE TYPE

Drapery, Curtain & Upholstery Stores

The 1982 census of retail trade counted a total of 4,063 drapery, curtain and upholstery stores in operation that year, with total sales amounting to $858.1 million, of which 84% was in window coverings, home textiles and related products. (The balance was accounted for by sales of floor coverings and miscellaneous receipts.)

Drapery, Curtain, Upholstery Store Sales, 1982
(In stores with payroll)

	No. of Stores	Mil. $	% of Total Store Sales
Curtains, draperies, etc.	4,063	$ 723.1	84.3%
Window, furniture coverings	4,063	689.7	80.4
Domestics	643	33.3	20.8

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade Industry Series, RC82-1-3

The off-price linens and domestics chains, previously described, were just about beginning their rapid rise (since halted) as the 1982 census got underway. According to the census counts, about 91% of the drapery, curtain specialty stores had total sales under $500,000 and these stores accounted for 63% of total sales of this outlet type. The 50 largest companies operated a total of 219 stores (5.4% of the total count) and had a 19% share of the total sales which were reported at $858 million in 1982.

RETAIL SALES BY PRODUCT

Official government figures are not compiled on retail sales by product, and trade sources must be relied on for this information. The trend in unit purchases of home textiles has been downward in recent years, but a pickup in major categories is expected in 1986 -- particularly in curtains and draperies which are expected to benefit from the rise in sales of new and replacement homes, as well as in the growth of disposable personal income.

Year-To-Year Changes in Unit Purchases by Consumers Of Domestics, 1982-1986

	Actual		Estimated	Projected
	1982	1983	1985/1984	1986/1985
Domestics, total	- 1%	- 4%	- 1%	+ 2%
Sheets & pillowcases	+ 5	- 8	- 4	+ 1
Towels & washcloths	- 1	- 5	+ 1	+ 1
Bed coverings	- 1	- 5	- 3	+ 1
Curtains & draperies	- 7	+ 5	- 7	+ 2

Source: The KSA/NPD Purchase Panel
(Kurt Salmon Associates and The NPD Group)

RETAIL SALES BY PRODUCT

According to Home Fashions Textiles, the total retail market for home textiles and related products amounted to about $11.6 billion in 1985. Estimates on individual product classifications were reported as follows by this source:

Estimated Retail Sales of Home Textiles & Related Products, 1985
(Millions of dollars)

Total, listed classifications	$ 11,629
Bedroom:	
Sheets & pillowcases	1,557
Specialty types:	
Flannel	150 - 200
Satin	75 - 100
Waterbed	100 - 150
Bedspreads, comforters*	1,100
Daybed, Hollywood, studio covers	22
Blankets (including automatic, conventional, throw styles)	650
Conventional	378
Automatic	220
Throw	52
Bed pillows	440
Mattress pads	200
Bath:	
Towels	1,500
Bath rugs	400
Shower curtains (including curtains, hooks, liners)	250
Bath accessories	110
Tabletop:	
Table linens	375
Kitchen textiles	300
Window treatments & related products:	
Curtains	675
Draperies	850
Drapery hardware	510
Shades, blinds, etc.:	
Mini-blinds	1,300
Vertical blinds	385
Pleated shades	150
Woven wood	100
Roll-up shades	425
Slip covers & throws	120
Decorative pillows	210

* HFD (The Weekly Home Furnishings Newspaper) has estimated 1985 sales of bedspreads at $134.6 million; comforters, $677 million.

Source: Home Fashions Textiles, January 1986

RETAIL SALES BY PRODUCT

The Bridal Market

The bridal market constitutes an important share of spending for home textiles, involving both purchases of gifts and purchases to furnish new homes. An analysis of the bridal market's share of spending for linens and domestics in 1984 indicated this market accounted for about 11% of total spending in 1984.

Bridal Market Share of Total Retail Sales

	Bridal Market Sales	
	Mil. $	% of National Total
Linens & domestics		
Sheets & pillowcases	$147.0	11.4%
Pillows	37.8	14.0
Mattress pads	14.4	7.6
Blankets	47.7	15.0
Blankets, electric	13.4	3.7
Comforters, quilts	70.1	11.8
Bedspreads	40.6	9.8
Towels, washcloths	134.5	10.1
Shower curtains	18.9	11.5
Bathroom mats, rugs, ensembles	25.0	7.3
Bathroom scales	11.2	9.2
Bathroom hampers	10.5	4.6
Bathroom accessories	22.3	9.7
Table linens	74.1	21.5
Other products	10.2	--

Source: Modern Bride Magazine:
A Summary of Bridal Market Retail Expenditures (1985)

Bedroom

Unit sales of sheets have declined steadily in the last decade. Too many choices, an overabundance of designer names, a confusing list of thread counts, too many promotions have contributed to the dismal performance. However, important stores are now giving more attention to their home textiles departments. Promotions are coming under better control, with a careful selection of designer lines and special-purchase promotional merchandise.

The developing trend toward the consolidation of bedding departments in department stores, as well as the low profits in the sheet and towel area, has caused sheet mills to get into the production of bedspreads -- formerly the province of curtain and drapery manufacturers. The development of coordinated lines has been a help to bedspread business, as well as to comforter sales, bed skirts and accessory items.

While luxury and all-cotton sheets sold very well in department stores last year, discount stores edged out department stores in share of total sheet sales in 1985, according to Home Fashions Textiles. The $1.557 billion retail pie was divided as shown in the following table.

RETAIL SALES BY PRODUCT

Sheet Sales By Retail Outlet, 1985

Total sales	100%
Discount stores	33
Department stores	32
Sears, Penney, Ward	23
Specialty stores*	12

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

An estimate by HFD (The Weekly Homefurnishings Newspaper) placed retail sales of sheets and pillowcases at $1.625 billion in 1985. Department stores were reported to control 27% of this market; mass merchants, 36%; Sears, Penney, Ward, 18%; specialty, 6%; other, 13%.

Flannel sheets, which were almost entirely imports, are now being produced by U.S. mills and are reported to be doing well in department stores and mass merchants, according to Home Fashions Textiles. As noted on page 33, retail sales are estimated at $150-$200 million. Based on a survey of 21 top volume department stores representing 355 units, HFT found that flannel sheets now account for almost a quarter of the department stores' total sheet business. In department stores, prints account for about 62% of flannel sheet business; among mass merchants, they represent 56%. Among the 20 top volume mass merchants surveyed, while the flannel sheet business is on the rise, it accounted for only about 20% of the mass merchants' sheet business.

Growing consumer interest in natural fibers stimulated both sheet and blanket business in 1985. Luxury, high-thread count sheets did well in upscale stores. Retailers were able to improve margins somewhat, as well as to increase volume. Comforter sales maintained continued growth despite a recent comeback in bedspread business, primarily due to the growing interest on the part of customers in sheet/comforter sets and other coordinated accessories.

In addition to sheets, the share of retail sales accounted for by outlet type for other bedroom products is reported as follows:

Percent of Total Sales of Specified Products By Retail Outlet Type, 1985

	Comforters	Blankets	Electric Blankets	Pillows	Mattress Pads	Bedspreads
Total sales	100%	100%	100%	100%	100%	100%
Department stores	29	25	12	26	25	23
Mass merchants	21	42	35	26	33	18
Sears, Penney, Ward	27	18	41	27	29	38
Specialty stores	22	10	--	14	10	20
Other	1	5	12	7	3	1

Source: HFD (The Weekly Homefurnishings Newspaper), Dec. 16, 1985

Bedroom (continued)

In the $430 million blanket classification, including conventionals, throws and thermals, Home Fashions Textiles reports that growth in demand for natural fibers has been one of the few bright spots for domestic producers, although competition from imports is stiff in the higher-end business in wool blankets and in high pile throws.

Cotton's share increased from 9.8% of total blanket business in 1980 to more than 17% in 1984 and 1985. Most of the growth is attributed to demand for all-cotton thermals. Cotton has helped retailers in some areas extend their blanket selling seasons. In the Sunbelt states, cotton thermals have become a year-round business. However, acrylics still account for the largest share of total blanket sales, followed by polyester, particularly among discounters and the major chains. The volume-oriented needlepunch blankets hold about 50% of the market; flocks, about 7%; wovens, the balance.

In a survey among 22 top-volume department stores and 21 top-volume mass merchants by Home Fashions Textiles, most reported blanket sales were up in 1985, after a bad year in 1984. Among department stores, 77% reported sales gains, with the average increase falling at 17.5%; another 23% said sales were flat; none of the respondents reported a decline. The throw category, automatics and thermals were reported to be strong performers.

HFT's breakdown on retail sales distribution in the blanket area was reported as follows: including sales of conventionals, throws, and flannels valued at $430 million, and automatic blankets, valued at $220 million.

	Conventionals, Throws, Flannels	Automatic Blankets
Total sales	100%	100%
Mass merchants	42	35
Specialty stores*	27	10
Sears, Penney, Ward	13	40
Department stores	18	15

* Includes off-price specialty retailers and linen specialty stores.

Source: Home Fashions Textiles, March 1986

Electric blankets which have been on a sales plateau appear to be headed for modest gains in units and dollars in 1986. A breakthrough technology resulting in non-thermostat blankets is expected to increase consumer interest, especially among younger affluent customers.

Comforter sales have maintained growth despite a recent comeback in bedspread sales. Growing interest in sheet/comforter sets plus coordinated accessories has helped comforter business.

Bedroom (continued)

Mattress pads (valued at $200 million) are doing best in natural fibers, although polyester/cotton blends still account for the major share of the market. Fitted pads account for 80% to 85% of the business. Sales in total have been registering an average gain of 10% a year, according to trade sources. Wool and fleece mattress pads are new items in the market; also waterproof felt pads and undulated foam mattress pads.

In reporting on sales of bed pillows (a $440 million retail market), HFT (January 1986) found that polyester accounted for 84% of unit sales; down, 12%; foam, 4%. Total unit sales of pillows, according to HFD (The Weekly Homefurnishings Newspaper), reached 41.8 million units in 1985 compared with 40.6 million in 1984 and 41.4 million in 1983. The proliferation of shapes, including so-called "ailment pillows" for necks and backs, is a growing trend.

Bath Shop

The $2.3 billion retail market for bath shop products is dominated by discounters. According to Home Fashions Textiles these stores had 35% of the market in 1985; Sears, Ward, Penney, 25%; department stores, 24%; specialty stores, including linen specialty stores, warehouse clubs, supermarkets, 16%.

The biggest segment of sales is in towels and washcloths, valued at $1.5 billion in 1985. HFD estimates the market for shower curtains and related products at $375 million in 1985 (vs. the $250 million HFT estimate) and bath rugs, mats, etc., at $350 million (vs. $400 million).

Towel sales were reported to be in a slump in 1985, as consumers seemed to focus on bigger-ticket homefurnishings. Solid colors are the best sellers, but mills are trying to stimulate sales by developing fancy jacquard towels which are coordinated with solid-color lines.

Bath rug business has been getting a boost from the return of cotton rugs and the advent of heat-set brightly colored nylon yarns. There is also a move to more hand-crafted rugs. The 3 by 5-foot rugs from bath rug manufacturers are filling a void created by the high price of broadloom rugs of this size, and are being used throughout the home. The speed with which department stores can adapt to change is giving them an edge in sales of bath rugs.

Shower curtain business picked up after a slow start in 1985. While vinyls still represent the largest share of the market, fabric curtains are gaining in popularity, and lend themselves to designs coordinated with other bath products.

From plastics and lacquerware to ceramics and brass, bath accessories are becoming more important. Total sales in 1985 were estimated at $110 million by Home Fashions Textiles and this category is continuing to register growth due to greater emphasis on gift and impulse merchandise in the bath shop. Night-lights are an important contributor to sales in this type of merchandise.

Bath Shop (continued)

While more of the styrene plastic bath accessories sold in U.S. stores are made in this country, most ceramic and porcelain bath accessories, which represent the bulk of the business in most department stores, chains and some mass merchants, are imported. And these are getting more expensive as the U.S. dollar has weakened in relation to foreign currencies, affecting prices of imports from Japan in particular.

Distribution of Bath Accessories Retail Sales
By Category, 1985

	Department Stores	Mass Merchants
Total	100%	100%
Ceramics/porcelains	28	60
Plastics	62	11
Lucite	--	11
Metal	7	10
Lacquerware	3	8

Source: Home Fashions Textiles, January 1986

An estimate by HFD, (The Weekly Home Furnishings Newspaper) (December 16, 1985) placed the value of bath accessories sales at $120 million, with sales share by outlet type reported as noted, in the following table, along with data for other bath shop products.

Percent of Specified Bath Shop Products By Retail Outlet Type, 1985

	Towels	Shower Curtains	Bath Rugs	Bath Accessories
Total sales	100%	100%	100%	100%
Mass merchants	35	58	25	14
Department stores	22	19	25	37
Sears, Penney, Ward	23	15	30	19
Specialty stores	14	6	10	17
Other	6	2	10	13

Source: HFD (The Weekly Homefurnishings Newspaper), Dec. 16, 1985

Tabletop Textiles/Kitchen Textiles

Percent of Total Sales of Tabletop Textiles/Kitchen Textiles
By Retail Outlet Type, 1985

	Table Linens	Kitchen Textiles
Total sales (mil. $)	$375	$300
Percent	100%	100%
Discount stores	32	50
Department stores	33	13
Sears, Penney, Ward	25	15
Specialty stores*	10	22

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

Source: Home Fashions Textiles, January 1986

Tabletop Textiles/Kitchen Textiles (continued)

Sales of Tablecloths By Store Type & Cloth Type

	Department Stores	Mass Merchants
Tablecloth types:		
Solid color	41%	33%
Lace/crochet	19	6
Embroidered	11	1
Woven	11	10
Vinyl	9	40
Jacquard/damask	4	1
Print	4	5
Terry cloth	1	4

HFD reports that a shift has occurred where table linens and kitchen textiles are sold. Department stores have been losing ground to mass merchants, which, according to this source, accounted for 30% of table linen sales in 1985 (vs. 33% for department stores) and 44% of kitchen textile business (vs. 13% for department stores).

The solid-color table linen category seems to have bottomed-out in recent years, although consumer response has been good for the Visa lines, as well as for the new Du Pont Spirit of Tableaux better polyester program. Placemats account for about 25% of sales. Christmas business is reported to account for 30% of total table linen department volume.

Decorative/Utility Pillows

According to the president of Brentwood Originals, which controls about 50% of the $200-million plus decorative/utility pillow business, department stores have lost share because they have been cutting back on their curtain and drapery departments. Many mass merchants and specialty chains, on the other hand, have been emphasizing curtains, draperies and other decorative home products.

These stores have a 34% share of total retail sales of pillows, according to HFD (The Weekly Homefurnishings Newspaper). Department stores' share in 1985 was reported at 26%; Sears, Ward, Penney, 15%; specialty stores, 22%; other outlets, 3%. Total decorative pillow sales are estimated at about $160 million, while utility pillow business (including chair pads, bed rests and wedges) amounted to $40 million.

Window Treatments

The total retail market for window treatments and related products is estimated at $4.4 billion (1986). In recent years, many large department stores -- including Macy's California, Bullock's, Filene's, Robinson's, and others, went out of the ready-made curtain and drapery business. A survey by Home Fashion Textiles, reported on in the May 1986 issue, indicated that many of the major department stores still in the business are cutting back further on space devoted to curtains and draperies. However, with the surge in home sales, as well as a good economy, window treatment lines could be one of the strongest performing segments of the home textiles retail market in 1986, and many stores are going after the curtain and drapery business more aggressively. Bedspreads supplied by curtain and drapery mills are part of the stepped-up promotions and displays.

RETAIL SALES BY PRODUCT

Window Treatments (continued)

An analysis of sales distribution patterns in window treatments was reported by HFT as follows:

Percent of Total Sales of Specified Window Treatment Products By Retail Outlet Type, 1985

	Curtains	Draperies	Drapery Hardware	Mini-Blinds	Vertical Blinds	Roll-Up Shades
Total sales (mil. $)	$675	$850	$510	$1,300	$385	$425
Percent	100%	100%	100%	100%	100%	100%
Specialty stores*	4	11	25	57	68	33
Discount stores	38	15	30	14	7	28
Department stores	13	14	10	14	7	10
Sears, Penney, Ward	45	60	35	15	18	29

* Includes off-price specialty chains, linen specialty stores, warehouse clubs, supermarkets.

Source: Home Fashions Textiles, January 1986

Sales of ready-made draperies by fabric type were reported by HFT as follows:

Textures	53%
Prints	19
Antique satin	13
Jacquards	8
Sheers	7

HFT has also analyzed merchandising trends in custom and made-to-measure curtains and draperies, based on a survey of 43 top department and chain stores representing more than 750 retail outlets.

Custom curtains and draperies generally did well in 1985, according to this survey, as 62% of the retailers reported sales gains, which averaged about 16%. On the other hand, more than half the stores said 1985 sales of made-to-measure curtains and draperies were flat or down compared with 1984, with decreases averaging 24%. Of the 42% reporting sales increases, gains averaged 24% in 1985 over 1984.

Antique satin accounted for the biggest share of both custom and made-to-measure curtains and draperies last year.

Percent of Custom & Made-To-Measure Sales By Category, 1985

	Custom	Made-To-Measure
Total sales	100%	100%
Antique satin	34	42
Sheers	25	22
Prints	19	12
Textures	15	17
Casements	7	7

Source: Home Fashions Textiles, April 1986

RETAIL SALES BY PRODUCT

Window Treatments (continued)

Top treatments represent a growing part of custom and made-to-measure business, and sales have more than doubled in the last few years. On average, tops account for 27% of custom sales and over 16% of made-to-measure business.

Hard goods -- blinds of all types -- clearly dominate the window treatment market, providing ease of care, privacy, and shade as well as offering a great variety of styles. Miniblind sales have grown at the fastest rate, accounting for an estimated $1.3 billion in annual sales. Sales gains are slowing, however, as newer types -- verticals and pleated blinds, for example -- gain in popularity.

CONSUMER PRICE INDEX

Home Textiles
Annual Average Consumer Price Index, 1984-1985
(December 1977 = 100 except where noted)

	1985	1984	% Change 1985/1984
Textile housefurnishings (1967 = 100)	240.7	236.9	+ 1.6%
Curtains, drapes, slipcovers, sewing materials	159.3	155.0	+ 2.8
Household linens	141.3	140.7	+ 0.4

Source: U.S. Bureau of Labor Statistics

RETAIL ADVERTISING

Percent of Year's Retail Newspaper Advertising Linage on Home Textiles Accounted For By Each Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Sheets	100.0%	10.8	5.5	7.4	7.9	7.4	10.9	9.2	6.4	6.4	7.6	8.3	12.2
Spreads	100.0	9.0	6.6	7.3	5.5	8.1	7.0	9.4	7.4	6.9	11.5	9.0	12.3
Towels	100.0	10.8	4.1	7.0	6.1	7.9	10.2	8.5	8.4	7.5	9.5	7.1	12.9

Source: Newspaper Advertising Bureau, Inc.
1986 Newspaper Advertising Planbook

CONSUMER BUYING HABITS

Percent of Year's Total Consumer Purchases Made Each Month

	Year	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Window coverings	100.0%	7.5	7.1	11.0	11.7	7.2	8.4	8.9	6.3	7.4	7.1	9.8	7.6
Blankets, comforters	100.0	9.1	5.7	7.8	6.9	4.7	6.5	7.3	7.4	9.1	11.1	10.1	15.3
Sheets, cases	100.0	4.8	5.9	7.2	7.1	6.0	9.3	8.3	7.7	8.8	7.9	9.4	12.6
Table linens	100.0	5.9	7.3	8.4	8.5	6.9	6.1	8.1	3.7	9.3	6.1	12.3	17.5

Source: Newspaper Advertising Bureau, Inc.
1986 Newspaper Advertising Planbook

CONSUMER BUYING HABITS

Seventeen Magazine's "Back-To-School Survey," conducted in September 1984, projected purchases of home textiles by a total of 8,543,000 teenage students in high school and college represented in the study.

Purchases of Home Textiles & Related Products
By Teenage Girl Students
(Figures are in thousands)

	Number Purchasing	Number Purchased	Total Expenditures
Towels	915	4,639	$ 46,390
Sheets/pillowcases	1,142	2,628	44,795
Bedspreads	1,039	1,283	62,109
Blankets	617	970	23,141

Source: Seventeen's Back-To-School Study 1985

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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Casual Wear, Jeans

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Prepared by
Market Research Division
Audrey S. Balchen, Director
Kenneth Greenman, Research Analyst

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E. B. Gold, Manager
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MEN'S SPORTSWEAR, CASUAL WEAR, JEANS

Market Trends

Consumer purchases of men's sportswear in 1986, overall, are expected to be relatively weak, according to an analysis by Kurt Salmon Associates. They cite the absence of a strong fashion influence for unit sales that will be flat or up only moderately. Two exceptions are expected to be in activewear and natural fiber sweaters. Retailer reports indicate that beachwear -- shorts, T-shirts and sunwear -- is doing very well. Retailers of swim and walk shorts report gains of up to 15% over last year, as basic solid colors and shorter lengths show surprising strength.

Men's sweaters, with a particular emphasis on cottons, are expected to have a good autumn in 1986. An important factor in the buying pattern for some retailers has been the devaluation of the American dollar and higher prices for foreign goods, which has made domestically-made sweaters more attractive. New colors and styling of cotton sweaters have prompted many retailers to stock up on cottons at the expense of wools. Overall, sweater prices at retail are expected to remain much the same as last year's, primarily due to some strong promotional prices on basics.

In the always competitive area of men's jeans, the current denim market was stagnant in terms of both dollars and units in 1985. According to MRCA Information Services, 1985 sales dropped 0.9% to $2.5 billion, while units fell 2.5% to 156 million. Department stores have lost market share due to the heavy price promotions offered by discounters and are relying on highly styled or treated denim to entice consumers to pay more.

Levi Strauss and Lee have both come out with new lines targeted at department and specialty stores. Levi's line, Special Reserve, is aimed at 25-35 year olds, a segment of the total consumer market that is clearly growing. Lee's Shawnee line, on the other hand, is targeted at 12-24 year olds, who have the highest per capita use of jeans in the market. As can be expected, Special Reserve is less flashy than Shawnee, with both lines scheduled to reach retailers in early summer. V.F. Corp's July acquisition of Blue Bell has created the nation's largest jeans manufacturing concern. The merged companies, which include Lee and Wrangler, control 25% of the U.S. jeans market while Levi Strauss has 22%.

Sales of novelty or contemporary woven sport shirts are expected to rise in 1986. Perhaps owing to the "Miami Vice" phenomena, growing numbers of men are livening up their wardrobes with exotic prints and solid-colored camp or pajama-collared woven shirts. Emphasis will be on unusual surface treatments like linen looks. Holiday 1986 offerings from West Coast contemporary sportswear manufacturers are filled with fancy woven shirts that have an urban western look.

Contemporary apparel, which represents an estimated 20% of total sportswear, is by now an established fashion concept with appeal to aging baby boomers -- the jeans generation that now finds itself in the 20-45 year old age group. Even establishment men's wear houses have gone after this market with updated and upscale collections. One such fashion direction is the introduction of abbreviated leisurewear lines that draw on traditional loungewear items. The new lines, in beefed-up fabrics and sportswear-inspired prints, are comfortable enough to stay around the house in, yet dressy enough for nightclubs and the supermarket. This trend was first spotted in Europe a couple of years ago when Italian men began wearing their boxer-type shorts to the beach and on the streets.

MARKET TRENDS

In activewear, department stores seek to maintain their niche through the sale of traditional brands with mass appeal, such as Jockey and Catalina. Instead of concentrating on athletic labels in direct competition with sporting goods stores, department stores are being very careful in their merchandise selections, leaving many sports-oriented manufacturers to the specialists. Some manufacturers are now taking the initiative in keeping activewear profitable in department stores by selling the idea of concept shops to the stores. Finely focused boutiques that carry a full line of active apparel for single vendors such as Reebok are springing up around the country. The Reebok plan is to open shops in one department store per market, with an emphasis on special in-store events.

This year's hot activewear category is fleecewear. It is being worn as both authentic and street activewear and this is representative of a larger trend in this area -- a narrowing of the gap between the two looks. New collections that combine the fashion savvy of street-active-looks with the comfort and function of true athletic looks, are being worn by both active purists and non-participants. A major reason this hybrid activewear gained prominence was the downturn in activewear business last year due to market saturation and price promoting by the retailers, coupled with overstocked inventories and the lack of fashion excitement by the suppliers. Such "bridge" classifications as traditional pieced, polyester/triacetate warmups with woven street-action looks are an indication that the activewear market seems to be ready for a new direction.

Private label programs continue to account for a significant portion of the men's sportswear market. The strategy for 1986 is to build upon well-established opening-priced basic assortments while adding to the share of higher-priced fashion goods. Sweaters are one of the two fastest growing private label classifications for men's wear (dress shirts being the other). Private label sweaters are 40%-60% of the mix in some stores and sell at all price points and in a wide variety of fashions. Some retailers expect the growth rate of private label sales to ease up over the next five years, citing new distribution efforts for major brands and a slowdown in the influx of imports.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A complete census of all U.S. manufacturers is compiled every five years by the U.S. Bureau of the Census. Data included in this Fact File are from the latest census of manufactures covering plants in operation in 1982 which had one or more employees. Where available, 1982 data are supplemented by comparable findings from the 1983 and 1984 annual surveys of manufactures. The annual surveys are conducted by the Census Bureau among a sample of manufacturers to provide key measurements of manufacturing activity during intercensal periods.

Men's sportswear/casual wear is not a distinct, separately reported industry. Merchandise of this type is combined in several industry classifications under the Standard Industrial Classification system, on which the following tables are based. The sections on PRODUCTION and on PRODUCT SHIPMENTS cover available data on specific product classifications.

GENERAL INDUSTRY STATISTICS

Men's & Boys' Clothing, n.e.c. (SIC 2329*)
(Primarily Sportswear/Outerwear)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	575	553	—
Number of establishments**	na	606	646	632	—
With 20 or more employees	na	366	386	400	—
Total employment (thous.)	44.9	48.2	44.6	43.8	- 6.8%
Production workers (thous.)	38.9	39.5	38.6	38.1	- 1.5
Payroll (mil. $)	$ 474.1	$ 473.6	$ 432.8	$ 285.8	+ 0.1
Value added by manufacture (mil. $)#	$1,003.5	$ 954.3	$ 931.3	$ 539.8	+ 5.2
Value of industry shipments (mil. $)##	$1,730.1	$1,595.4	$1,658.3	$1,065.1	+ 8.4
Capital expenditures, new (mil. $)	$ 22.2	$ 28.0	$ 18.3	$ 20.2	- 20.7

Knit Outerwear Mills (SIC 2253*)
(Including Men's, Women's, Children's)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	893	903	—
Number of establishments**	na	852	923	953	—
With 20 or more employees	na	422	482	551	—
Total employment (thous.)	67.8	74.5	66.8	73.0	- 9.0%
Production workers (thous.)	57.2	63.4	55.9	62.7	- 9.8
Payroll (mil. $)	$ 835.0	$ 862.3	$ 741.4	$ 582.0	- 3.2
Value added by manufacture (mil. $)#	$1,906.4	$1,842.6	$1,704.8	$1,159.5	+ 3.5
Value of industry shipments (mil. $)##	$3,607.1	$3,410.0	$3,182.4	$2,335.9	+ 5.8
Capital expenditures, new (mil. $)	$ 116.6	$ 63.8	$ 53.5	$ 49.9	+ 82.8

Leather & Sheep-Lined Clothing (SIC 2386*)
(Including Men's, Women's, Children's)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	186	236	—
Number of establishments**	na	175	186	239	—
With 20 or more employees	na	50	52	80	—
Total employment (thous.)	2.9	3.5	4.3	6.7	- 17.1%
Production workers (thous.)	2.4	3.0	3.6	5.9	- 20.0
Payroll (mil. $)	$ 39.0	$ 47.4	$ 48.9	$ 54.7	- 17.7
Value added by manufacture (mil. $)#	$ 84.9	$ 91.8	$ 95.7	$ 94.8	- 7.5
Value of industry shipments (mil. $)##	$ 194.4	$ 212.8	$ 221.3	$ 214.1	- 8.6
Capital expenditures, new (mil. $)	$ 1.1	$ 0.4	$ 0.9	$ 1.6	+175.0

GENERAL INDUSTRY STATISICS

Men's & Boys' Shirts & Nightwear (SIC 2321*)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	535	669	—
Number of establishments**	na	708	741	928	—
With 20 or more employees	na	537	560	679	—
Total employment (thous.)	90.9	88.3	88.7	114.7	+ 2.9%
Production workers (thous.)	78.5	74.7	76.0	103.0	+ 5.1
Payroll (mil. $)	$ 905.4	$ 854.3	$ 819.0	$ 711.3	+ 6.0
Value added by manufacture (mil. $)#	$2,071.6	$1,851.0	$1,785.5	$1,445.7	+ 11.9
Value of industry shipments (mil. $)##	$3,688.8	$3,573.4	$3,477.7	$2,934.6	+ 3.2
Capital expenditures, new (mil. $)	$ 59.6	$ 38.7	$ 37.2	$ 25.9	+ 54.0

Men's & Boys' Separate Trousers (SIC 2327*)

	1984	1983	1982	1977	% Change 1984/83
Number of companies	na	na	269	404	—
Number of establishments**	na	337	356	514	—
With 20 or more employees	na	252	268	335	—
Total employment (thous.)	59.7	59.1	56.9	70.9	+ 1.0%
Production workers (thous.)	48.1	48.7	49.4	61.9	- 1.2
Payroll (mil. $)	$ 612.6	$ 615.4	$ 564.9	$ 474.0	- 0.5
Value added by manufacture (mil. $)#	$1,237.7	$1,159.5	$1,111.2	$ 845.6	+ 6.7
Value of industry shipments (mil. $)##	$2,373.2	$2,407.8	$2,165.4	$1,718.0	- 1.4
Capital expenditures, new (mil. $)	$ 30.1	$ 34.1	$ 35.7	$ 22.8	- 11.7

na not available
n.e.c. not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification System (SIC), determined by the principal product made, as shown below:

SIC 2329 covers manufacturers specializing in the production of men's and boys' heavy outerwear coats and jackets, swimwear and athletic shorts, ski and snow pants and other outerwear not elsewhere classified made in cut-and-sew plants.

SIC 2253 covers mills primarily engaged in knitting outerwear (men's, women's, children's) from yarn or in manufacturing outerwear from knit fabric produced in the same mill.

SIC 2386 covers manufacturers primarily engaged in manufacturing leather and sheep-lined garments for men, boys, women and children.

SIC 2321 covers establishments primarily engaged in the manufacture of men's, youths' and boys' shirts (including dress, polo and sport shirts, but not including work shirts) and nightwear cut and sewn from purchased woven or knit fabric.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2327 covers establishments primarily engaged in the manufacture of men's, youths' and boys' separate trousers and slacks.

**Each business location is counted as a separate establishment. Data on number of establishments in 1983 are from the Census Bureau's County Business Patterns.

#Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

##Value of industry shipments includes, along with receipts for contract work, all items made by or for each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary products and secondary products made by manufacturers in these industries. The value of primary products alone of these industries, plus the value of shipments by manufacturers classified in other industries (called PRODUCT SHIPMENTS), is covered on pages 15 and 16.

Source: U.S. Bureau of the Census,
1984, 1983 Annual Survey of Manufactures,
1982, 1977 Census of Manufactures

Industry Shipments

Based on data compiled by the Census Bureau, the International Trade Administration (also part of the U.S. Department of Commerce) compiles annual projections covering industry and product shipments on a current dollar and on a constant dollar basis for a limited number of apparel classifications. Projections for 1984 and 1985 compared with reported 1982 and 1983 figures are noted below.

Value of Industry Shipments, 1982-1985
(Dollar figures in millions)

	1985(e)	1984(e)	1983	1982	% Change 1985/84	% Change 1984/83
Industry (Men's & Boys'):						
Shirts & nightwear						
Shipments (current $)	$3,355	$3,469	$3,573	$3,478	- 3.3%	- 2.9%
Shipments (1982$)	3,153	3,270	3,494	3,478	- 3.6	- 6.4
Separate Trousers						
Shipments (current $)	$2,532	$2,545	$2,408	$2,165	- 0.5	+ 5.7
Shipments (1982$)	2,414	2,500	2,407	2,165	- 3.5	+ 3.9

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration: 1986 U.S. Industrial Outlook

GENERAL INDUSTRY STATISTICS

Employment & Earnings

According to the Bureau of Labor Statistics (U.S. Department of Labor), employment in the men's wear industry declined in 1985 from the year before. A total of 84,500 people were employed in the men's and boys' shirt industry in 1985, with 73,100 classified as production workers. These totals, however, are down 10.8% and 11.0%, respectively, from 1984 levels. Total employment in the men's and boys' trousers industry was down 9.2% in 1985, with a drop of 8.5% in the number of production workers.

The Bureau of Labor Statistics uses a different methodology in compiling data than the Census Bureau, accounting for differences in reported figures.

Employment & Earnings in Men's Sportswear/Casual Wear Manufacturing

	April Averages			Annual Averages		
	1986	1985	% Change 1986/85	1985(r)	1984(r)	% Change 1985/84
Men's & boys' shirts & nightwear (SIC 2321)						
All employees (thous.)	85.9	84.4	+ 1.8%	84.5	94.7	-10.8%
Production workers (thous.)	74.4	72.9	+ 2.1	73.1	82.1	-11.0
Average weekly earnings	$194.16	$175.74	+10.5	$182.81	$179.58	+ 1.8
Average hourly earnings	$ 5.15	$ 5.05	+ 2.0	$ 5.05	$ 4.88	+ 3.5
Average weekly hours	37.7	34.8	+ 8.3	36.2	36.8	- 1.6
Men's & boys' separate trousers (SIC 2327)						
All employees (thous.)	56.4	56.6	- 0.4	57.5	63.3	- 9.2
Production workers (thous.)	49.3	49.2	+ 0.2	50.4	55.1	- 8.5
Average weekly earnings	$188.68	$182.18	+ 3.6	$191.33	$191.66	- 0.2
Average hourly earnings	$ 5.30	$ 5.39	- 1.7	$ 5.30	$ 5.18	+ 2.3
Average weekly hours	35.6	33.8	+ 5.3	36.1	37.0	- 2.4
Knit outerwear mills (SIC 2253)						
All employees (thous.)	66.7	62.4	+ 6.9	63.6	66.3	- 4.1
Production workers (thous.)	58.5	54.2	+ 7.9	55.5	57.0	- 2.6
Average weekly earnings	$240.54	$219.24	+ 9.7	$228.46	$215.97	+ 5.8
Average hourly earnings	$ 6.33	$ 6.09	+ 3.9	$ 6.06	$ 5.79	+ 4.7
Average weekly hours	38.0	36.0	+ 5.6	37.7	37.3	+ 1.1

(r) revised

Source: U.S. Bureau of Labor Statistics,
Employment and Earnings

GENERAL INDUSTRY STATISTICS

Concentration in the Industry

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. The following tables show the extent to which the industry is dominated by large multiunit companies. This trend is in evidence most recently with the $800 million agreement by VF Corp. to acquire Blue Bell, a move that is expected to make VF -- the maker of Lee jeans -- the largest jeans manufacturer in the country.

Type of Company Ownership & Share of Shipments, 1982

	No. of Companies	Plants No.	Plants %	Employees Thous.	Employees %	Value of Industry Shipments Thous. $	Value of Industry Shipments %
Men's & boys' shirts and nightwear	535	741	100.0%	88.7	100.0%	$3,477.7	100.0%
Multiunit companies	149	355	47.9	68.8	77.6	2,897.8	83.3
Single-unit companies	386	386	52.1	19.9	22.4	579.9	16.7
Men's & boys' separate trousers	269	356	100.0	56.9	100.0	2,165.4	100.0
Multiunit companies	71	158	44.4	40.3	70.8	1,645.1	76.0
Single-unit companies	198	198	55.6	16.6	29.2	520.3	24.0
Men's & boys' clothing, n.e.c.	575	646	100.0	44.6	100.0	1,658.3	100.0
Multiunit companies	118	189	29.3	25.3	56.7	1,045.6	63.1
Single-unit companies	457	457	70.7	19.3	43.3	612.7	36.9

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Type of Organization (MC82-S-5)

Share of Value of Industry Shipments in Men's & Boys' Sportswear/Casual Wear Manufacturing, 1982

	Value of Industry Shipments (Mil. $)	Percent Accounted For By: 4 largest companies	8 largest companies	20 largest companies	50 largest companies
Men's & boys' clothing, n.e.c. (SIC 2329)	$1,658.3	12%	20%	38%	62%
Knit outerwear mills (SIC 2253)	3,182.4	19	29	45	64
Leather & sheep-lined clothing (SIC 2386)	221.3	32	47	69	88
Men's & boys' shirts & nightwear (SIC 2321)	3,477.7	19	29	48	69
Men's & boys' separate trousers (SIC 2327)	2,165.4	30	45	64	83

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Concentration in the Industry (continued)

Concentration By Employment Size, 1982

	Establishments		Value Added by Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Men's & boys' shirts and nightwear industry --	741	100.0%	$1,785.5	100.0%	$3,477.7	100.0%
By establishment (plant) size:						
Under 20 employees	182	24.6	54.0	3.0	162.8	4.7
20 - 49 employees	139	18.8	121.4	6.8	272.2	7.8
50 - 99 employees	119	16.1	196.9	11.0	409.1	11.8
100 or more employees	301	40.6	1,413.2	79.1	2,635.6	75.8
Men's & boys' separate trousers industry --	356	100.0%	$1,111.2	100.0%	$2,165.4	100.0%
By establishment (plant) size:						
Under 20 employees	88	24.7	18.1	1.6	57.9	2.7
20 - 49 employees	42	11.8	64.7	5.8	164.3	7.6
50 - 99 employees	40	11.2	49.5	4.5	110.6	5.1
100 or more employees	186	52.2	978.9	88.1	1,832.6	84.6
Knit outerwear mill industry --	923	100.0%	$1,704.8	100.0%	$3,182.4	100.0%
By establishment (plant) size:						
Under 20 employees	441	47.8	120.8	7.1	272.7	8.6
20 - 49 employees	223	24.2	143.7	8.4	273.4	8.6
50 - 99 employees	120	13.0	158.0	9.3	309.3	9.7
100 or more employees	139	15.1	1,282.3	75.2	2,327.0	73.1

* For an explanation of terms, see page 5.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures

Number of Men's & Boys' Sportswear/Casual Wear Manufacturing Establishments By Employment Size, 1983

	Men's & Boys'		
	Shirts & Nightwear (SIC 2321)	Separate Trousers (SIC 2327)	Clothing, n.e.c. (SIC 2329)
Total establishments	708	337	606
Number of employees:			
Under 10 employees	109	66	163
10-49 employees	184	46	213
50-99 employees	118	40	107
100-499 employees	280	169	117
500 or more employees	17	16	6

(continued)

Concentration in the Industry (continued)

Number of Men's & Boys' Sportswear/Casual Wear Manufacturing Establishments By Employment Size, 1983

(continued)

	Knit Outerwear Mills (SIC 2253	Leather & Sheep-Lined Clothing (SIC 2386)
Total establishments	852	175
Number of employees:		
Under 10 employees	276	98
10-49 employees	347	59
50-99 employees	112	10
100-499 employees	98	8
500 or more employees	19	--

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
County Business Patterns, 1983

Location of the Industry

Industry Statistics For Leading States, 1982

	All Plants		All Employees		Value Added By Manufacture*	
	Total	With 20+ Employees	No.(thous.)	%	Mil. $	%
Men's & boys' shirts & nightwear	741	50	88.7	100.0%	$1,785.5	100.0%
Leading States						
Georgia	87	80	12.9	14.5	227.0	12.7
New York	43	40	9.1	10.3	222.1	12.4
Alabama	108	49	4.3	4.8	199.6	11.2
Pennsylvania	47	46	11.9	13.4	164.0	9.2
Tennessee	54	47	7.1	8.0	160.6	9.0
South Carolina	45	41	8.7	9.8	158.5	8.9
Men's & boys' separate trousers	356	268	56.9	100.0	1,111.2	100.0
Leading States						
Texas	24	22	9.0	15.8	201.9	18.2
Georgia	47	44	9.7	17.0	174.7	15.7
Tennessee	15	14	3.8	6.7	77.9	7.0
Mississippi	15	14	4.4	7.7	76.4	6.9
New York	57	25	1.7	3.0	69.5	6.3
Missouri	14	13	3.5	6.2	59.4	5.3
Men's & boys' clothing, n.e.c.	646	386	44.6	100.0	931.3	100.0
Leading States						
New York	102	50	4.1	9.2	107.6	11.6
California	83	31	3.1	7.0	68.0	7.3
Pennsylvania	48	33	3.8	8.5	64.0	6.9
Missouri	18	14	1.7	3.8	44.4	4.8

(continued)

Location of the Industry (continued)

Industry Statistics For Leading States, 1982
(continued)

	All Plants Total	All Plants With 20+ Employees	All Employees No.(thous.)	All Employees %	Value Added By Manufacture* Mil. $	Value Added By Manufacture* %
Leather & sheep-lined clothing	186	52	4.3	100.0%	$ 95.7	100.0%
Leading States						
New York	73	15	1.1	25.6	24.3	25.4
California	37	6	0.6	14.0	23.0	24.0
Knit Outerwear Mills	923	482	66.8	100.0	1,704.8	100.0
Leading States						
Pennsylvania	88	63	13.2	19.8	331.4	19.4
North Carolina	51	32	11.1	16.6	325.1	19.1
New York	416	178	11.4	17.1	297.6	17.5

n.e.c. not elsewhere classified.
* For an explanation of terms, see page 5.

Source: U.S. Bureau of the Census
1982 Census of Manufactures MC82-I-22B, 23A, 23D

PRODUCTION

Among the major classifications of men's sportswear/casual wear covered in Census Bureau reports, all registered declines in production by U.S. manufacturers in 1985 compared with 1984 with the exception of jeans and dungarees. The sharpest drop was reported in sweater output (-11.5%), followed by outerwear (-10.9%), and by shorts (-10.3%).

Summary of Production of Specified Types of Men's Sportswear/Casual Wear 1984, 1985

	Production (Thous. Units) 1985	Production (Thous. Units) 1984(r)	% Change 1985/1984
Dress & sport trousers	116,413	122,965	- 5.3%
Jeans & dungarees	151,503	143,461	+ 5.6
Jean-cut casual slacks	34,852	36,035	- 3.3
Sport shirts, total (in thous. dozen)	32,587	33,103	- 1.6
Knit (thous. dozen)	29,203	29,565	- 1.2
Woven (thous. dozen)	3,384	3,538	- 4.4
Sweaters	2,248	2,540	-11.5
Shorts	41,900	46,723	-10.3
Outerwear jackets (except ski & not including leather)	13,716	15,396	-10.9

(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports, MA23E(85)-1

PRODUCTION

The detailed Current Industrial Reports issued by the Census Bureau on apparel production in July 1986 include information on fabric type, and construction (knit vs. woven). The figures are developed through a mail survey of all known U.S. manufacturers and jobbers with the exception of very small plants (usually less than five employees). They include garments assembled abraod and shipped back to U.S. cutters under the terms of item 807 of the Tariff Schedule.

Information on activewear covers output for men and for boys (combined). In reported categories, sweats registered strong gains in output in 1985 compared with 1984. Skiwear production by U.S. manufacturers, on the other hand, registered a sharp decline.

Production of Specified Sportswear/Casual Wear By Fabric/Construction, 1984, 1985

	Production (Thous. Units)		% Change
	1985	1984(r)	1985/1984
Men's:			
Separate dress & sport trousers, including uniform	116,413	122,965	- 5.3%
By fabric:			
All cotton & chiefly cotton	14,839	15,900	- 6.7
Man-made fiber/wool blends (chiefly man-made)	16,288	20,961	- 22.3
All man-made & chiefly man-made	61,790	61,176	+ 1.0
All wool & chiefly wool	7,844	8,881	- 11.7
Other fabric	7,405	7,907	- 6.3
Knit fabric:			
All cotton & chiefly cotton	na	na	--
All man-made & chiefly man-made	6,722	6,832	- 1.6
Other fabric	na	na	--
Not specified	1,525	1,308	+ 16.6
Uniform trousers	5,589	5,394	+ 3.6
Jeans & dungarees	151,503	143,461	+ 5.6
All cotton & chiefly cotton	144,742	136,306	+ 6.2
All man-made & chiefly man-made	5,425	6,659	- 18.5
Not specified	1,336	496	+169.4
Jean-cut casual slacks	34,852	36,035	- 3.3
All cotton & chiefly cotton	27,040	26,058	+ 3.8
All man-made & chiefly man-made	7,456	9,693	- 23.1
Other fabric	356	284	+ 25.4
Shorts, including athletic shorts	41,900	46,723	- 10.3
By fabric:			
All cotton & chiefly cotton	21,109	20,411	+ 3.4
All man-made & chiefly man-made	15,744	13,066	+ 20.5
Other fabric	2,390	--	--
Not specified	2,657	13,246	- 79.9
By construction:			
Woven fabric	17,898	17,719	+ 1.0
Knit fabric	16,724	16,967	- 1.4
Not specified	7,278	12,037	- 39.5

(continued)

Production of Specified Sportswear/Casual Wear By Fabric/Construction, 1984, 1985
(continued)

	Production (Thous. Units)		% Change
	1985	1984(r)	1985/1984
	(Thousands of Dozens)		
Heavy nontailored outer jackets (except ski), including uniform	1,143	1,283	- 10.9%
By construction:			
Woven fabric	978	1,032	- 5.2
Knit fabric	55	79	- 30.4
Not specified	110	172	- 36.0
By fabric:			
All cotton & chiefly cotton	237	347	- 31.7
All man-made & chiefly man-made	623	562	+ 10.9
All wool & chiefly wool	115	79	+ 45.6
Other fabric	7	--	--
Not specified	161	295	- 45.4
Uniform jackets	171	148	+ 15.5
Light nontailored outer jackets, including uniform	1,795	1,758	+ 2.1
By construction:			
Woven fabric	947	989	- 4.2
Knit fabric	531	610	- 13.0
Not specified	317	159	- 99.4
By fabric:			
All cotton & chiefly cotton	157	150	- 4.7
All man-made & chiefly man-made	1,317	1,414	- 6.9
All wool & chiefly wool	22	23	- 4.3
Other fabric	7	7	--
Not specified	292	164	+ 78.0
Woven sport shirts	3,384	3,538	- 4.4
All cotton & chiefly cotton	1,336	1,280	+ 4.4
All man-made & chiefly man-made	1,866	1,974	- 5.5
Other fabric	71	72	- 1.4
Not specified	111	212	- 47.6
Knit sport shirts, except sweatshirts*	29,203	29,565	- 1.2
By fabric:			
All cotton & chiefly cotton	9,449	9,556	- 1.1
All man-made & chiefly man-made	17,379	17,548	- 1.0
All wool & chiefly wool Other fabric	408	470	- 13.2
Not specified	1,967	1,991	- 1.2
By type:			
Full open front shirts	392	620	- 36.8
Partial front opening (golf, polo type)	5,886	6,442	- 8.6
T-shirts made for outerwear, incl. tanktops	19,823	19,510	+ 1.6
Not specified	3,102	2,993	+ 3.6

(continued)

Production of Specified Sportswear/Casual Wear By Fabric/Construction, 1984, 1985
(continued)

	Production (Thous. Units)		% Change
	1985	1984(r)	1985/1984
Sweaters, including sweater vests, knit cardigans & pullovers	2,248	2,540	- 11.5%
All cotton & chiefly cotton	427	444	- 3.8
All man-made & chiefly man-made	1,184	1,211	- 2.2
All wool & chiefly wool	468	616	- 24.0
Other fiber Not specified	169	269	- 37.2
Men's & boys':			
Activewear			
Sweatshirts	7,559	6,722	+ 12.5
Sweatpants	3,027	2,496	+ 21.3
Warmup or jogging suits	1,554	1,490	+ 4.3
Swimwear	1,534	1,668	- 8.0
Woven fabric	1,247	1,248	--
Knit fabric	na	185	--
Not specified	na	235	--
Skiwear, including jackets & pants	76	94	- 19.1

*Includes turtleneck and pullover crew-neck knit shirts.
na not available
(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23E(85)-1

Percent of Men's Sportswear Production by Month, 1985

	Dress & Sport Trousers	Jeans & Dungarees	Jean-cut Casual Slacks	Sport Shirts		Sweaters
				Knit	Woven	
Total production	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
Percent of total done in:						
January	8.9	7.1	6.3	7.6	7.0	5.1
February	9.5	6.8	5.4	7.8	6.5	5.6
March	10.3	8.8	5.6	8.0	7.3	7.4
April	8.5	9.2	6.5	8.7	5.9	8.3
May	9.1	8.5	7.5	9.1	8.5	7.2
June	7.6	9.3	10.0	8.4	7.9	7.7
July	7.1	7.7	11.2	7.8	7.4	8.4
August	8.8	9.6	10.4	8.5	9.6	11.0
September	8.0	8.0	8.0	8.1	8.6	11.1
October	8.2	9.3	10.0	9.9	12.2	11.4
November	7.8	9.0	11.6	8.4	11.6	10.3
December	6.2	6.7	7.5	7.7	7.5	6.4

Source: Based on U.S. Bureau of the Census,
Current Industrial Reports, MA23E(85)-1

MATERIALS CONSUMED IN PRODUCTION

The Census Bureau has reported figures on the value of materials consumed in the men's and boys' clothing, n.e.c. industry (SIC 2329), which covers manufacturers of athletic clothing including uniforms, swimwear, washable suits, skiwear, outerwear, etc., made in cut-and-sew plants, as well as the trouser/slacks industry.

Materials Consumed By Kind: 1977, 1982
(Delivered cost in millions of dollars)

	1982	1977
Men's & Boys' Clothing, n.e.c. (SIC 2329)		
Value of materials, containers, supplies	$ 601.6	$ 405.5
Broad woven fabrics	267.3	180.8
Purchased knitted fabrics	108.6	45.5
All other materials and components, parts, containers, supplies	127.4	96.0
Materials, etc. n.s.k.	98.3	83.2
Men's & boys' separate trousers (SIC 2327)		
Value of materials, containers, supplies	$ 695.2	$ 658.2
Broad woven fabrics	370.9	316.5
Purchased knitted fabrics	119.4	94.5
All other materials and components, parts, containers, supplies	126.3	111.0
Materials, etc. n.s.k.	78.6	136.2

n.e.c. not elsewhere classified
n.s.k. not specified by kind.

Source: U.S. Bureau of the Census, 1982 Census of Manufactures

PRODUCT SHIPMENTS

In contrast with "industry shipments" previously covered and defined on page 5, the value of product shipments covers the total value of shipments of specified items by all U.S. manufacturers, regardless of industry classification based on primary products.

The total value of shipments of major classifications of sportswear/casual wear covered in Census Bureau data amounted to $7.0 billion in 1985, representing a gain of 1% compared with 1984. The biggest percentage gain was noted in the value of shipments of sweat pants (including both men's and boys'), up 13% compared with 1984. Fleecewear has continued to register the strongest gains in demand.

Value of Shipments of Specified Sportswear/Casual Wear By All U.S. Manufacturers, 1984, 1985
(Millions of dollars)

	1985	1984(r)	% Change 1985/84
Total, reported products	$7,029.4	$6,954.3	+ 1.1%
Sportswear/casual wear, men's	6,190.4	6,169.1	+ 0.3
Sport shirts, total	1,553.3	1,521.8	+ 2.0
Woven	350.7	347.9	+ 0.8
Knit, except sweatshirts*	1,202.6	1,173.9	+ 2.4
Sweaters, including sweater vests, cardigans & pullovers	292.7	321.3	- 8.9
Trousers, slacks & shorts, total	3,747.5	3,726.9	+ 0.6
Separate dress & sport trousers, including uniform	1,542.2	1,562.9	- 1.3
Jeans & dungarees	1,685.2	1,605.0	+ 5.0
Jean-cut casual slacks	372.7	404.9	- 8.0
Shorts, including athletic shorts	147.4	154.1	- 4.3
Heavy nontailored outer jackets, except ski, including uniform	320.0	328.8	- 2.7
Light nontailored outer jackets, including uniform	276.9	270.3	+ 2.4
Activewear, total (men's & boys'):	839.0	785.2	+ 6.8
Sweatpants	187.5	166.0	+13.0
Sweatshirts	379.9	348.6	+ 9.0
Warmup or jogging suits	110.4	111.7	- 1.2
Swimwear	120.5	110.5	+ 9.0
Skiwear, including jackets & pants	40.7	48.4	-15.9

*Includes turtleneck and pullover crew neck knit shirts.
(r) revised

Source: U.S. Bureau of the Census
Current Industrial Reports,
Men's & Boys' Outerwear, MA23E(85)-1

Data from the census of manufactures is more detailed than the CIR reports, providing information on shipments of products not covered in the latest reports.

PRODUCT SHIPMENTS

Quantity & Value of Shipments of Specified Men's Wear By All U.S. Producers, 1977, 1982

(Quantity in thousands of units, value in millions of dollars)

	1982		1977	
	Quantity	Value	Quantity	Value
Men's:				
Casual (nontailored) suits	79	$ 3.3	1,962	$ 52.9
Casual (nontailored) sportscoats	418	18.7	3,113	63.3
Separate vests, incl. sweater vests	1,998	23.8	nr	nr
Knit sport shirts (excl. sweatshirts)	31,010*	1,268.4	24,446*	762.8
Full open front shirts	701*	nr	nr	nr
Partial front opening (golf, polo type)	7,440*	nr	nr	nr
T-shirts made for outerwear, incl. tank tops	20,602*	nr	--	--
Type not reported	2,267*	--	--	--
Sweatshirts (incl. boys')	4,818*	269.8	3,914*	147.3
Woven sport shirts (designed primarily for sport, leisure or casual wear)	4,168*	382.1	8,983	577.5
Separate dress & sport trousers, incl. uniform	115,117	1,411.2	121,984	1,217.5
Shorts, except athletic	3,984	28.5	6,435	30.4
Jean-cut casual slacks	3,400*	464.8	nr	nr
Jeans & dungarees (excl. waistband overalls)	11,596*	1,443.4	nr	nr
Sweaters, incl. sweater vests	3,235*	361.8	3,031*	234.3
Swimwear & athletic shorts (incl. boys')	5,904*	290.7	3,224	104.1
Athletic uniforms, sold as such (incl. boys')	1,254*	76.9	nr	nr
Heavy nontailored outerjackets incl. uniform (excl. ski, leather)	1,584*	403.3	1,864*	352.5
Leather coats, jackets (incl. boys')	132*	110.1	154*	94.1
Outerwear, n.e.c. such as slack suits, ski and snow pants, etc. (incl. boys')	2,817*	338.0	4,467*	282.6

nr not reported
n.e.c. not elsewhere classified
*Quantity in thousands of dozens

Source: U.S. Bureau of the Census, 1982 Census of Manufactures MC82-1-23A, 23D

The total value of shipments of all items covered in the above table amounted to $6.9 billion in 1982 versus an estimated $4.7 billion in 1977. Included in the above table are both products made in cut-and-sew shops and products made in knitting mills.

PRODUCT SHIPMENTS

Information on the share of the total value of shipments of specified types of sportswear/casual wear which was accounted for by the largest companies has been compiled by the Census Bureau in the censuses of manufactures. Since 1982, the U.S. industry has grown smaller in terms of number of producers and the trend to concentration of shipments among the largest companies has continued.

Share of Value of Total Shipments Accounted For By Largest Companies, 1977, 1982

	Total Shipments (mil. $)	% of Total Accounted For By Largest Companies			
		Top 4	Top 8	Top 20	Top 50
Men's:					
Tailored dress & sport coats, jackets					
1982	$ 944.0	24%	42%	73%	93%
1977	623.0	19	33	62	85
Knit sport shirts, incl. sweatshirts (incl. boys')*					
1982	1,112.9	23	38	62	87
1977	809.0	25	40	64	87
Dress & sport shirts, woven (incl. boys')					
1982	1,212.1	29	42	64	87
1977	1,344.6	26	40	61	79
Separate dress & sport trousers (incl. boys')					
1982	2,107.0	25	39	57	77
1977	1,631.4	24	35	53	71
Jeans, incl. jeans-cut casual slacks (incl. boys')					
1982	2,543.9	67	76	88	97
1977	1,962.8	63	74	87	97
Heavy outerwear coats, jackets, non-tailored (incl. boys')					
1982	449.8	20	35	61	88
1977	397.3	21	34	57	83
Leather & sheep-lined clothing (men's, women's, children's)					
1982	207.3	30	45	67	87
1977	210.6	15	27	50	79

*Shirts made in cut-and-sew shops of knitted fabric. (Other knit shirts are made in knitting mills and comparable data is not available.)

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Concentration Ratios in Manufacturing MC82-S-7

PRODUCT SHIPMENTS

By State

For a limited number of major products the U.S. Census Bureau has included information on value of shipments by state in 1982 compared with 1977, based on the census of manufactures compiled every five years. Following is information for leading states.

Value of Shipments By All Producers in Leading States: 1977, 1982
(Millions of dollars)

	1982		1977	
Product*	Value	%	Value	%
Men's tailored dress & sport coats & jackets, total	$ 944.0	100.0	$ 623.0	100.0
States				
Georgia	77.6	8.2	27.8	4.5
Maryland	76.7	8.1	20.1	3.2
Massachusetts	122.4	13.0	63.3	10.2
New York	51.1	5.4	70.5	11.3
Ohio	77.2	8.2	27.3	4.4
Pennsylvania	216.1	22.9	179.5	28.8
Texas	124.2	13.2	15.0(e)	2.4
Other	198.7	21.0	219.5	35.2
Men's & boys' knit sport shirts, total	$1,112.9	100.0	$ 809.0	100.0
States				
Alabama	185.5	16.7	126.6	15.6
California	41.6	3.7	52.8	6.5
Georgia	88.5	8.0	15.0(e)	1.9
New York	145.3	13.1	89.8	11.1
North Carolina	178.0	16.0	75.2	9.3
Pennsylvania	43.4	3.9	80.2	9.9
South Carolina	127.6	11.5	48.1	5.9
Tennessee	84.7	7.6	58.4	7.2
Other	218.3	19.6	262.9	32.5
Men's & boys' dress & sport shirts, total	$1,212.1	100.0	$1,344.6	100.0
States				
Alabama	105.7	8.7	117.0	8.7
Georgia	183.4	15.1	137.7	10.2
New York	225.0	18.6	228.9	17.0
North Carolina	109.3	9.0	67.0	5.0
Pennsylvania	136.9	11.3	81.6	6.1
South Carolina	70.6	5.8	67.5	5.0
Tennessee	70.3	5.8	158.3	11.8
Other	310.9	25.6	486.6	36.2

(continued)

PRODUCT SHIPMENTS

By State (continued)

Value of Shipments By All Producers in Leading States: 1977, 1982
(Millions of dollars)
(continued)

	1982		1977	
Product*	Value	%	Value	%
Men's & boys' jeans, jean-cut casual slacks, total	$2,543.9	100.0	$1,962.8	100.0
States				
Alabama	84.4	3.3	61.8	3.1
California	150.1	5.9	50.0+	2.5
Georgia	219.8	8.6	181.6	9.3
Kentucky	86.9	3.4	27.4	1.4
Mississippi	138.3	5.4	130.5	6.6
New York	88.4	3.5	54.9	2.8
North Carolina	42.0	1.7	40.6	2.1
Tennessee	458.1	18.0	342.5	17.4
Texas	580.8	22.8	396.1	20.2
Virginia	105.1	4.1	124.7	6.4
Other	590.0	23.2	552.7	28.2
Men's & boys' heavy outerwear coats & jackets, total	$ 449.8	100.0	$ 397.3	100.0
States				
California	23.5	5.2	25.7	6.5
Missouri	38.0	8.4	28.3	7.1
New York	29.4	6.5	62.7	15.8
Pennsylvania	23.8	5.3	32.2	8.1
Tennessee	62.0	13.8	12.6	3.2
Washington	34.0	7.6	41.5	10.4
Other	239.1	53.2	194.3	48.9
Men's & boys' outerwear, n.e.c., total**	$ 770.8	100.0	$ 423.3	100.0
States				
Alabama	85.9	11.1	7.1	1.7
California	53.7	7.0	30.9	7.3
Georgia	61.6	8.0	17.6	4.2
Missouri	45.0	5.8	30.6	7.2
New York	112.0	14.5	63.9	15.1
Pennsylvania	54.8	7.1	24.2	5.7
Tennessee	47.2	6.1	35.3	8.3
Other	310.6	40.3	213.7	50.5

(e) estimated
n.e.c. not elsewhere classified
* Covers products made from purchased knit or woven fabrics. Does not include products made in knitting mills.
**Covers manufacturers classified in SIC2392, which includes swimwear, activewear, athletic uniforms, wash suits, and other sport/casual wear made from purchased knit or woven fabrics.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures
Industry Series MC82-1-23A

PRODUCT SHIPMENTS

Activewear Shipments By Leading Manufacturers

A listing of the leading active sportswear manufacturers is compiled annually by SportStyle (Fairchild Publications). The following table lists the top five companies in specified activewear categories based on 1985 sales. Figures include women's activewear as well as men's.

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)

Tennis Apparel	1985 Sales
Jantzen	$ 30
Jockey	25
Catalina	18.5
Head sportswear	15
Fila	14.2

Golf Apparel	1985 Sales
Munsingwear	$ 31.9
La Monde du Golf	12.5
Jockey	10
Tall	8.5
Ultrasport	8.5

Active Sportswear	1985 Sales
Izod-Lacoste	$ 300
Jantzen	80
Catalina	60
Merona	55
Spalding	53

Athletic Footwear Apparel	1985 Sales
Nike	$ 172
Adidas	130
Puma	50
Pony	18
Converse	10.6

Warmups	1985 Sales
Tultex	$ 259.9
Bassett Walker	248
Pannill	191.5
Russell Knit Apparel	190
Stone Manufacturing	50

Running/Cycling/Triathalon Apparel	1985 Sales
Hind	$ 9.1
Dolfin	9.0
Sub 4	7.9
Bill Rodgers & Co.	7.4
Moss Brown & Co.	5.5

Rugged Outerwear	1985 Sales
Woolrich	$ 125
Pacific Trail	77
Patagonia	28
Jansport	20
The North Face	14

Hunting Apparel	1985 Sales
Walls	$ 18
Buddy Schoelkopf	16
Saf-T-Bak	10
Columbia Sportswear	9
Utica DuxBak	5.8

Ski Apparel	1985 Sales
CB Sports	$ 26.3
SportObermeyer	26
Roffe	21.5
White Stag	19
Head Sportswear	16

Beachwear	1985 Sales
Ocean Pacific	$ 237
Hobie Sportswear	45
Gotcha	30
Laguna	28
Catchit	13

Competitive Swimwear	1985 Sales
Speedo	$ 42
Arena	13.8
The Finals	6.5
Hind	3
Dolfin	1

Source: SportStyle
July 14, 1986

PRODUCER PRICE TRENDS

Producer (factory) prices of men's & boys' wear rose an average 1.1% in April 1986 -- the latest month for which data is available from the Bureau of Labor Statistics -- from April 1985. This annual gain is in line with the 1.2% rise in prices for all apparel products.

Among specific men's sportswear items, the largest gain in factory prices was in non-cotton and wool trousers (+3.4%). Prices for trousers made chiefly of cotton showed the largest decline (-11.4%) in April 1986 compared with a year ago.

Producer Price Index For Selected Sportswear/Casual Wear Items
(December 1981 = 100)
(unless otherwise specified)

	Monthly Averages				% Change
	April		December		April 1986/
	1986	1985	1985	1984	1985
All commodities*	297.9	309.3	310.2	309.8	- 3.7%
All apparel*	206.0	203.6	205.1	202.1	+ 1.2
Men's & boys' apparel, total*	232.4	229.9	231.2	228.8	+ 1.1
Men's trousers, except uniform					
Chiefly cotton	92.2	104.1	92.2	103.6	-11.4
Chiefly wool	107.5	105.9	107.4	104.8	+ 1.5
Other fabrics	109.9	106.3	106.6	106.9	+ 3.4
Men's denim jeans & jean-cut casual slacks	106.4	104.1	106.3	103.9	+ 2.2
Men's corduroy jeans & jean-cut casual slacks	101.9	101.9	101.9	101.5	--
Men's jeans & jean-cut casual slacks	107.0	105.7	107.4	105.7	+ 1.2

* 1967 average = 100

Source: U.S. Bureau of Labor Statistics

FOREIGN TRADE

All segments of the U.S. apparel industry have been under increasingly heavy pressure from imports coming in from countries with low labor costs, or more efficient machinery and/or the advantages gained by a strong U.S. dollar which lowered the cost of imports in the U.S. Many U.S. firms have tried to counter this onslaught on their markets, both here and abroad, by foreign producers by making use of "sourcing" -- that is, using suppliers outside the firm, particularly foreign suppliers with lower costs -- to furnish some, or even all, apparel components at various stages of the manufacturing process. Some of the foreign suppliers are wholly owned by the U.S. manufacturer or are joint ventures.

Another tactic has been use of the "807" rule. This allows a U.S. apparel firm to cut fabric for the various parts of a garment, ship the parts to a foreign country for assembly, then reimport the assembled garments, paying duty only on the value added abroad. Many manufacturers in the U.S. are taking advantage of this law to cut costs and remain more competitive with direct imports.

FOREIGN TRADE

Other recent developments include the intensification of the "Crafted With Pride in America" program, initiated by textile and apparel manufacturers to encourage U.S. consumers to buy made-in-the U.S.A. products. A "Quick Response" program is also underway in the apparel industry to improve shipping schedules and to better serve the fast-changing requirements of fashion retailers in the U.S.

Details on imports of specific products are not always included in Census Bureau published data, but are combined in broad industry or product classifications. The following summarizes general trends in major product categories, compiled by the ITA.

Value of Imports & Exports, 1982-1985
(Millions of dollars)

					% Change		
Imports	1985(e)	1984(e)	1983	1982	1985/84	1984/83	1983/82
Men's & boys'							
Suits/coats	$ 979	$ 894	$ 660	$ 613	+ 9.5	+ 35.4	+ 7.6
Shirts/nightwear	2,627	2,455	1,882	1,707	+ 7.0	+ 30.5	+10.2
Exports							
Men's & boys'							
Suits/coats	$ 17.4	$ 18.7	$ 17.2	$ 31.8	- 7.0	+ 8.7	-45.9
Shirts/nightwear	79.5	81.1	99.3	139.0	- 2.0	- 18.3	-28.6
Trousers	62.5	59.5	42.9	44.6	+ 5.0	+ 38.7	- 3.8

(e) estimated

Source: U.S. Department of Commerce, International Trade Admin.
1986 Industrial Outlook

Imports of men's sportswear and casual wear represent a large portion of total U.S. supply. However, as noted, exact measurements on the quantities of specific items are not available due to the classification of merchandise reported by the Census Bureau in the foreign trade reports.

All types of shirts, including knit and woven, dress and sport, and including both men's and boys', are reported as a single category. The total value of these imports amounted to almost $2.0 billion last year, gaining 10.3% compared with 1984. (Exports, on the other hand, amounted to only $63 million in 1985, continuing the downtrend which began in 1981 as the value of the U.S. dollar soared.) Korea, Hong Kong and Taiwan were major suppliers, accounting for 52% of U.S. imports of men's and boys' shirts in 1985.

Imports of sweaters for men and boys into the U.S. registered a gain of less than 1.0% in 1985 in terms of quantity, but gained 6.3% in terms of value compared with 1984. Imports of men's trousers, slacks and shorts rose 11.4% in 1985, to $884.4 million. Quantity was up 9.2%, to 14.5 million dozen. The value of exports in this period declined 18.6%.

Imports account for more than 60% of the domestic market for leather and sheeplined clothing, although their value in 1985 dropped almost 18% after a 40% increase in 1984. Imports of men's and boys' coats and jackets fell an estimated 14% in 1985, according to the ITA, to $193 million. Korea was the principal source, supplying over 70% of men's leather and sheeplined coats. Exports are a small factor in this industry.

U.S. Imports & Exports of Men's and Boys' Shirts and Pants, 1983-1985

	1985	1984	1983	% Change 1985/84
Men's and boys' shirts (all types)				
Imports:				
Quantity (thous. dozen)	43,314	41,896	33,482	+ 3.4%
Value (thous. $)	$1,979,359	$1,791,923	$1,288,423	+ 10.3
Exports:				
Quantity (thous. dozen)	2,374	2,376	2,815	- 0.1
Value (thous. $)	$ 62,596	$ 64,240	$ 74,416	- 2.6
Men's and boys' trousers, slacks and shorts				
Imports:				
Quantity (thous. dozen)	14,549	13,325	11,648	+ 9.2
Value (thous. $)	$884,448	$794,221	$614,209	+ 11.4
Exports:				
Quantity (thous. dozen)	2,635	2,629	1,916	+ 0.2
Value (thous. $)	$ 75,698	$ 92,988	$ 78,209	- 18.6

Source: U.S. International Trade Commission:
U.S. Trade Shifts in Selected Commodity Areas: Annual 1985
USITC Publication 1864

Quantity & Value of Imports of Specified Men's & Boys' Sportswear/Casual Wear, 1984, 1985

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Specified men's & boys' sportswear/ casual wear items, total	60,066.3	57,722.5	+ 4.1%	$3,319.8	$3,071.0	+ 8.1%
Trousers, slacks & shorts, total	12,997.2	11,996.2	+ 8.3	844.4	778.9	+ 8.4
Wool, not knit	318.5	283.8	+12.2	64.7	56.5	+14.6
Cotton, not knit	7,221.1	6,463.2	+11.7	483.4	424.8	+13.8
Man-made fibers, not knit	5,457.6	5,239.2	+ 4.2	296.2	297.6	- 0.5
Shirts, total	42,874.2	41,554.3	+ 3.2	2,089.9	1,929.3	+ 8.3
Not knit, total	25,846.1	22,155.3	+16.7	1,374.0	1,100.7	+24.8
Sport, cotton corduroy	162.0	170.1	- 4.8	11.0	10.2	+ 7.9
Sport, cotton except corduroy	8,107.4	5,686.8	+42.6	447.7	291.7	+53.4
Wool	222.5	221.3	+ 0.5	20.4	18.9	+ 7.6
Man-made fibers	14,281.8	13,280.7	+ 7.5	680.1	599.6	+13.4
Knit, total	17,028.1	19,399.0	-12.2	715.9	828.6	-13.6
Cotton	7,456.4	9,327.6	-20.1	378.3	441.9	-14.4
Wool	68.1	88.8	-23.3	9.5	10.1	- 6.6
Man-made fibers	7,747.2	8,461.2	- 8.4	307.8	354.2	-13.1

(continued)

FOREIGN TRADE

Quantity & Value of Imports of Specified Men's & Boys' Sportswear/Casual Wear, 1984, 1985
(continued)

	Quantity (Thous. Dozen)			C.I.F. Value* (Mil. $)		
	1985	1984	% Change 1985/84	1985	1984	% Change 1985/84
Sweaters, total	4,194.9	4,172.0	+ 0.5%	$ 385.4	$ 362.7	- 6.3%
Wholly or in part cashmere, knit	39.2	36.3	+ 8.0	21.0	18.0	+16.8
Sheep-like hair, except cashmere, knit	198.7	183.3	+ 8.4	24.0	21.3	+12.1
Wool	1,384.9	1,332.1	+ 4.0	158.5	149.1	+ 6.3
Cotton	323.0	309.9	+ 4.2	43.7	37.1	+17.7
Man-made fibers	2,249.1	2,310.4	- 2.7	138.3	137.2	+ 0.8

*The C.I.F. (cost, insurance, freight) value represents the value of imports at the first port of entry into the U.S. It is based on the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports FT 135
December 1984, 1985

AT THE RETAIL LEVEL

THE POTENTIAL MARKET (POPULATION)

The fastest growing segment of the male population between 1985 and 2005 will be the 35 - 54 year old age bracket. This growth, which reflects the aging of the baby boom generation, will push the number of males in this segment to 40.8 million, accounting for more than 30% of the total male population. The second fastest growing age group will be the 55 - 64 year old males, a group expected to grow almost 34% over the next 20 years. These two groups, taken together, have a great deal of discretionary income and will be in their prime earning years, a fact that augurs well for men's sportswear manufacturers.

Estimated Male Population of the U.S., 1985, and Projections* to 1994 & 2005

	Number (Thousands)			% Change	Percent Distribution		
	1985	1994	2005	2005/1985	1985	1994	2005
Total, all ages	116,649	125,464	134,297	+15.1%	100.0%	100.0%	100.0%
Under 16 years	28,530	30,746	29,723	+ 4.2	24.5	24.5	22.1
16 years & older	88,119	94,718	104,574	+18.6	75.5	75.4	77.9
16 - 19	7,548	6,712	8,058	+ 6.8	6.5	5.3	6.0
20 - 34	31,918	29,725	27,416	-14.1	27.4	23.7	20.4
35 - 54	26,671	35,187	40,769	+52.9	22.9	28.0	30.4
55 - 64	10,500	9,793	14,060	+33.9	9.0	7.8	10.5
65 & older	11,529	13,300	14,271	+23.8	9.9	10.6	10.6
Median age (years)	30.3	33.0	36.0	--	--	--	--

*Middle of a series of three different projections, each based on alternative assumptions for future fertility, mortality, and net immigration levels. (Includes Armed Forces overseas)

Note: Columns may not add to totals shown due to rounding.

Source: U.S. Bureau of the Census,
Current Population Reports
Series P-25, No. 952 (May 1984),
P-25, No. 985 (April 1986)

Recent studies show that exercise and health are top priorities among seniors (persons age 55 and older). The affluence and fast growth rate of this group, plus the fact that a large segment are concentrated in the Sunbelt states, where outdoor activities are year-round, has had a strong impact on the men's sports/casual wear market. More manufacturers are making a special effort to go after the mature market.

Besides the tremendous growth in interest in sports participation and fitness activities, the sportswear/casual wear market has registered growth due to the more relaxed standards of dress that prevail today, both in and out of the work place, compared with just a few years ago.

The availability of pools, both indoor and outdoor, throughout the country has made this the number one participatory sport for both men and women. A recent study by the Gallup Organization indicated that 42% of adult males had gone swimming in the 12 months before the survey. The second most popular active sport for adult males was fishing, followed by bicycling.

Male Participation in Specified Sports, 1985

(Percent of adults participating in the past 12 months)

	Percent
Swimming	42%
Fishing	41
Bicycling	29
Pool/Billiards	27
Weight training	26
Jogging	25
Softball	25
Camping	24
Bowling	23
Basketball	22

Source: Gallup Organization Inc., 1986

Male Height/Weight Groups

The following table covers 1985 estimates on the number of 18-74 year old U.S. males in specified height and weight groups. The numbers show that, even though most males are "standard" sizes, there is a large big and tall market that is expected to grow as the country gets older and heavier Anyone whose waist measurement is within four inches of his chest or over 6 feet 3 inches in height is considered a candidate.

Manufacturers engaged in the manufacture of big and tall men's wear view the business as a viable way to boost sales and build themselves a steady, specialized business to complement their regular-sized business. The big and tall customer is just as eager as the regular-sized customer for fashion colors and styles, and usually pays about 15% more because of additional fabric and labor costs. Most manufacturers of big and tall merchandise gear their lines to big and tall specialists and men's specialty stores with developed big and tall businesses. An increasing number of them, however, are developing programs for department stores' new big and tall departments.

Distribution of the U.S. Male Population by Height/Weight Groups, 1985

(Numbers in thousands)

	Total	Under 5'6"	5'6"-5'8"	5'9"-6'1"	6'2"& Over
Total, 18-74 years	80,332	10,925	28,839	37,917	2,631
Percent	100.0%	13.6%	35.9%	47.2%	3.3%
Weight:					
Under 150 lbs.	18,075	5,463	7,391	5,061	161
Percent	22.5%	6.8%	9.2%	6.3%	0.2%
150-179 lbs.	33,579	4,017	14,219	14,942	402
Percent	41.8%	5.0%	17.7%	18.6%	0.5%
180-199 lbs.	15,825	964	4,820	9,319	723
Percent	19.7%	1.2%	6.0%	11.6%	0.9%
200-229 lbs.	9,640	402	2,008	6,427	803
Percent	12.0%	0.5%	2.5%	8.0%	1.0%
230 lbs. & over	3,213	80	402	2,169	562
Percent	4.0%	0.1%	0.5%	2.7%	0.7%

Source: Fairchild Market Research Dept. based on National Health Survey (U.S. Dept. of Health and Human Services) & U.S. Bureau of Census population projections.

RETAIL SALES BY PRODUCT

According to a market projection made at the end of 1985 by Kurt Salmon Associates, men's sportswear consumption in 1986 was expected to be relatively weak. The absence of a strong fashion influence was cited as a factor. Based on data collected by the NPD (National Panel Diary) Group, Kurt Salmon reports that two bright spots for the industry will be activewear, particularly for the beach, and natural fiber sweaters. Unit purchases of casual shirts are expected to be flat from 1985, and slacks and denim jeans purchases were expected to rise a moderate 1% and 2%, respectively.

Year-to-Year Changes in Purchases of Specified
Men's Sportswear, 1982-1986
(% Change in Units)

	Projected	Estimated	Actual	
	1986/1985	1985/1984	1984/1983	1983/1982
Casual shirts	0	- 2.0%	-5.0%	- 4.0%
Active sportswear	+5.0%	+12.0	+6.0	+28.0
Sweaters	+3.0	+ 5.0	-4.0	+ 3.0
Slacks	+1.0	- 2.0	+4.0	- 2.0
Denim jeans	+2.0	- 5.0	-6.0	- 2.0

Source: Kurt Salmon Associates/NPD Purchase Panel, Soft Goods Outlook for 1986

The U.S. Bureau of the Census has recently released reports on retail sales of specific major merchandise categories by type of retail outlet, based on the complete census of retail trade covering operations in 1982.

The following tables cover the sales share in reported men's wear classifications held by types of retail outlets. This includes categories which were separately reported by several types of stores (not all stores selling men's wear reported details by product category). The census of retail trade, compiled every five years by the Bureau of the Census, U.S. Department of Commerce, is the only official data compiled on merchandise line sales by type of retail outlet.

Men's Shirt Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Shirts, knit & woven, dress & sport, reported total	40,821	100.0	$4,445,861	100.0
Department stores	8,328	20.4	2,127,968	47.9
Men's wear stores	15,299	37.5	1,181,587	26.6
Women's ready-to-wear stores	1,956	4.8	84,624	1.9
Family clothing stores	15,238	37.3	1,051,682	23.7

Men's Pants Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Tailored & dress slacks, casual slacks, jeans, walking shorts, reported total	39,843	100.0	$4,747,285	100.0
Department stores	8,419	21.1	1,751,702	36.9
Men's wear stores	15,038	37.7	1,417,266	29.9
Women's ready-to-wear stores	1,524	3.8	73,210	1.5
Women's accessory & specialty stores and furriers	53	0.1	1,180	#
Family clothing stores	14,809	37.2	1,503,927	31.7

Less than 0.1%

Men's Sweater Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Sweaters, reported total	29,000	100.0	$1,148,813	100.0
Department stores	5,796	20.0	552,451	48.1
Men's wear stores	12,711	43.8	332,810	29.0
Women's ready-to-wear stores	986	3.4	23,471	2.0
Family clothing stores	9,507	32.8	240,081	20.9

Men's Activewear Sales By Major Outlet Type: 1982
(In retail establishments with payroll)

	Establishments		Sales By Outlet Type	
	Number	Percent	Thous.$	Percent
Activewear, reported total*	33,318	100.0	$1,831,869	100.0
Department stores	6,931	20.8	796,943	43.5
Men's wear stores	7,923	23.8	174,505	9.5
Women's ready-to-wear stores	690	2.1	29,546	1.6
Family clothing stores	8,713	26.2	287,178	15.7
Sporting Goods stores#	9,061	27.2	543,697	29.7
General line	6,568	19.7	408,849	22.3
Specialty line	2,493	7.5	134,848	7.4

*Not including footwear
#Includes both men's and boys' activewear

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade

RETAIL SALES BY PRODUCT

Additional data on men's wear sales by type of outlet is reported by MRCA Information Services in Apparel Merchandising (May and June 1986). According to this source, unit sales of men's jeans dropped from about 160 million in 1984 to 156 million in 1985, a 2.5% decline. In terms of dollar volume, the classification fell 0.9% to about $2.5 billion. Discount operations improved their market share significantly for the year by relying heavily on price promotions to generate volume. They gained business at the expense of chains, specialty stores and department stores to account for 28% of unit volume and 23% of dollar volume.

Retail sales of woven sport shirts totaled nearly $1.8 billion in 1985, up 13.2% for the year, according to MRCA. Mass merchandisers accounted for 28% of sales, picking up market share from specialty stores.

Retail Sales of Men's Jeans By Outlet Type, 1984 and 1985

	Dollar Volume		Unit Volume	
	1985	1984	1985	1984
Chains	25%	26%	24%	27%
Discount stores	23	19	28	22
Specialty stores	20	23	19	20
Department stores	16	16	14	15
Variety stores	2	2	2	2
All others	14	14	13	14

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, June 1986)

Retail Sales of Woven Shirts By Outlet Type, 1984 and 1985
(Share of Dollar Volume)

	1985	1984
Mass merchandisers	28%	25%
Discount/Off-price stores	21	21
Department stores	20	20
Specialty stores	15	19
Variety stores	2	2
Other	14	13

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, May 1986)

The preceding table, which shows a growing share of woven sport shirt sales by mass merchandisers, corresponds to a growth in total sales of this merchandise. 1985 sales of woven sport shirts were nearly $1.8 billion, up 13.2% for the year. Knit shirt sales, on the other hand, declined 13.8%. A major reason for this was the 16% increase in woven shirt imports in 1985, which represented 61% of all shirt imports.

RETAIL SALES BY PRODUCT

Retail Sales of Men's Tops, 1983-1985
(Millions of dollars)

	1985	1984	1983	% Change 1985/84
Total tops	$8,073	$7,940	$7,514	+ 1.7%
Knits	2,006	2,328	2,208	-13.8
Dress shirts	2,234	2,058	1,948	+ 8.6
Woven sport shirts	1,779	1,572	1,546	+13.2
Sweaters	1,755	1,652	1,503	+ 6.2
Work shirts	299	330	310	- 9.4

Source: MRCA Information Services, Stamford, Conn.
(Apparel Merchandising, May 1986)

RETAIL SALES BY STORE TYPE

Activewear

Retail sales of apparel classified as "activewear" for men totaled an estimated $2.2 billion in 1985, according to industry analysts. The latest available government data on retail sales of men's activewear, from the census of retail trade, reports sales amounting to $1.8 billion in 1982 (as noted on page 28). Department stores had the largest share of the market with 43.5% of total sales. Sporting goods stores trailed with 29.7%.

Department stores, after a major effort at luring active sports participants away from sporting goods stores with authentic brands like Adidas, Nike and Puma, reversed course a bit in the first half of 1986 by concentrating instead on more traditional labels like Jantzen, Catalina, Jockey and Robert Bruce. Many stores are increasing their private label business in an effort to offer more unique fashion items. Presently among the major activewear styles are warmups, knit shirts and pull-on pants.

Activewear collections that play off of sports themes such as baseball and football, yet combine new fashion ideas like geometric prints, reflect the intent of many manufacturers to incorporate ideas from both authentic and street active looks. This year's hot activewear category -- fleecewear -- is being used for both types of activewear, with industry-wide sales up 15%-30% over last year, according to major manufacturers.

Activewear sales estimates for 1984-1986 have been compiled by the National Sporting Goods Association, through a nationally-representative survey of 80,000 households. It does not include institutional purchases and certain product categories.

RETAIL SALES BY STORE TYPE

Activewear

Estimated Retail Sales of Men's Activewear, 1984-1985
(Millions of dollars)

	Forecast 1986	Estimated 1985	Estimated 1984	% Change 1986/1985
Swimwear	$145.9	$141.7	$143.7	+ 3.0%
Golf clothing	168.8	163.8	165.3	+ 3.1
Parkas - down/fiber-filled	134.0	131.2	131.2	+ 2.1
Shorts - elastic waist	126.4	126.5	126.5	--
Skiwear	188.3	172.5	162.7	+ 9.2
Sweatshirts	170.8	162.6	154.9	+ 5.0
Tennis clothing	87.2	82.5	80.9	+ 5.7
Vests - down/fiber-filled	106.6	106.5	112.1	--
Warmup suits	279.2	279.3	346.5	--

Source: Fairchild Market Research Department based on National Sporting Goods Association The Sporting Goods Market in 1986

Specialty Stores

Sales of men's wear in specialty stores -- men's wear stores and family clothing stores -- is covered in the 1982 census of retail trade. Men's wear stores accounted for $6.7 billion worth of men's wear sales, 31.6% of the total (second to department stores with 45.1%). Family clothing stores -- stores primarily selling apparel for men, women and children without specializing in any one line -- accounted for $4.6 billion worth of men's wear sales (21.5%).

Sales of Specified Men's Wear in Specialty Stores, 1982

	Establishments		Sales
MEN'S WEAR STORES	Number	Percent	(Thous. $)
Reported total	17,480	100.0	$7,734,522
Men's wear, total	17,480	100.0	6,741,742
Shirts, knit and woven, dress and sport	15,299	87.5	1,181,587
Tailored and dress slacks, casual slacks, jeans, walking shorts	15,038	86.0	1,417,266
Sweaters	12,711	72.7	332,810
Activewear	7,923	45.3	174,505
FAMILY CLOTHING STORES			
Reported total	17,859	100.0	13,451,003
Men's wear, total	17,859	100.0	4,583,566
Shirts, knit and woven, dress and sport	15,238	85.3	1,051,682
Tailored and dress slacks, casual slacks, jeans, walking shorts	14,809	82.9	1,503,927
Sweaters	9,507	53.2	240,081
Activewear	8,713	48.8	287,178

Note: Each store location is separately counted as an "establishment."

Source: U.S. Bureau of the Census, 1982 Census of Retail Trade

RETAIL SALES BY STORE TYPE

Department Stores

Data on merchandise line sales in department stores has been made available in recently issued reports covering the complete 1982 census of retail trade. Included in the totals, in addition to traditional department stores, are discount department stores and the department store operations of national chains such as Sears and Montgomery Ward.

Men's wear sales were reported by 9,947 department stores in 1982, 99.7% of all department stores. Sales of this merchandise amounted to $9.6 billion, which was 9.7% of all department store sales that year. The following table shows sales of specific men's wear classifications in department stores.

Sales of Specified Men's Wear in Department Stores, 1982

	Establishments		Sales
	Number	Percent	(Thous. $)
Department stores, total	9,981	100.0	$99,170,163
Men's wear, total	9,947	99.7	9,606,115
Shirts, knit and woven, dress and sport	8,328	83.4	2,127,968
Tailored and dress slacks, casual slacks, jeans, walking shorts	8,419	84.4	1,751,702
Sweaters	5,796	58.1	552,451
Activewear	6,931	69.4	796,943

Note: Each store location is separately counted as an "establishment."

Source: U.S. Bureau of the Census,
1982 Census of Retail Trade

In the typical department store with a total volume over $1 million, sales of casual wear jackets & slacks accounted for 25.2% of total male apparel sales, according to the National Retail Merchants Association. Their 1985 report on operating results shows that sport shirts represented 11% of the total male apparel sales, while sweaters/vests and active sportswear were 6.1% and 7.1%, respectively. Active sportswear departments had sales per square foot of $235.80.

RETAIL SALES BY STORE TYPE

Department Stores

Merchandising & Operating Results of Men's Sportswear Departments In Department Stores With Sales Over $1 Million

(Median results)

	Adult Male Apparel (104)*	Casual Wear Jackets & Slacks (55)*	Sport Shirts (31)*	Sweaters & Vests (25)*	Active Sportswear (45)*
Net sales, % change from last year	+ 9.0%	+ 10.5%	+ 10.4%	+14.3%	+ 13.1%
Sales, % to total store	13.1	3.6	1.5	1.0	1.0
Net sales, % of adult male apparel	100.0	25.2	11.0	6.1	7.1
$ sales per sq. ft. of selling space (main or largest unit)	$167.2	$185.2	$171.1	na	$235.8
Cumulative markon, %	51.0	49.5	52.2	52.3	50.5
Gross margin, % of net sales (incl. cash discounts)	41.9	38.4	44.1	43.9	40.9
Markdowns, retail, % of sales	19.6	23.6	21.7	27.8	22.9
Number of stock turns (times)	2.7	2.7	3.5	3.9	3.1
Sales promotions, % of net sales	2.9	3.9	4.5	na	4.0

*Number in parenthesis refers to the number of reporting companies.
na not available.

Source: National Retail Merchants Association
Merchandising & Operating Results of 1985
(1984 edition)

Sporting Goods Stores

Sporting goods stores, which have always held a major share of apparel sales for active sports participants, have been broadening their apparel stocks to include the active looks sought by non-participants (street activewear). Warmups, at various price points and in various fabrications, continue to be a big seller. Many sporting goods stores report that apparel sales represent a growing share of their sales, at the expense of declining equipment sales.

According to the 1982 census of retail trade, released by the government in late 1985, there were 20,152 sporting goods stores with payroll in operation anytime during the year. This figure includes 9,252 general line sporting goods stores (45.9%) and 10,900 specialty line sporting goods stores (54.1%). These two types are defined as follows:

General line sporting goods stores: stores primarily selling a general line of sporting goods and equipment for hunting, camping, fishing, tennis, golf, etc. Also gym and fitness equipment.

Specialty line sporting goods stores: stores specializing in a maximum of four lines of sporting goods and equipment, such as bicycles, skiing equipment, golf equipment, etc.

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including leased departments)

			Sales of specified merchandise lines		
				Percent of total sales of—	
	Stores		Amount	Stores selling	All
	Number	Percent	(thous. $)	the line	Stores
General line sporting goods stores sales, total	9,252	100.0	$4,377,471	—	100.0
Activewear, except footwear	6,568	71.0	691,363	—	15.8
Men's & boys'	6,568	71.0	408,849	12.9	9.3
Women's & girls'	6,236	67.4	282,514	9.2	6.5
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Activewear, except footwear	2,493	22.9	245,786	—	7.8
Men's & boys'	2,593	22.9	134,848	15.9	4.3
Women's & girls'	2,177	22.0	110,938	15.0	3.5

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL ADVERTISING PATTERN

Percent of Newspaper Ad Linage Done By Retailers Each Month

	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Slacks	3.6%	6.2	8.2	8.1	6.8	12.2	7.5	11.9	8.1	7.9	9.1	10.4
Sportswear/ Accessories	4.2%	4.6	6.7	6.5	7.3	13.4	6.5	8.5	6.1	7.8	11.8	16.6

Source: Advertising Checking Bureau, 1984

CONSUMER PRICE TRENDS

While the consumer price index for men's wear rose 3.0% in 1985, the CPI for coats and jackets fell 0.2%. Prices of shirts and pants (dungarees, jeans and trousers) rose at a higher level than the average for all men's wear -- up 3.8% and 3.4%, respectively.

The latest monthly averages released by the Bureau of Labor Statistics are for April 1986 and they show a definite moderating in consumer prices for men's wear. The CPI for all men's apparel was up just 1.0% from April 1985, while the averages for shirts and pants declined for the year.

CONSUMER PRICE TRENDS

Consumer Price Index of Specified Men's Sportswear Items
(December 1977=100, unless otherwise specified)

	April Averages			Annual Averages		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All items (1967=100)	325.3	320.1	+ 1.6%	322.2	311.1	+ 3.6%
Apparel commodities less footwear (1967=100)	188.4	188.2	+ 0.1	188.1	183.2	+ 2.7
Men's apparel	126.0	124.7	+ 1.0	124.7	121.1	+ 3.0
Coats & jackets	100.4	100.4	--	101.4	101.2	+ 0.2
Shirts	132.2	132.5	- 0.2	132.2	127.4	+ 3.8
Dungarees, jeans & trousers	117.3	119.1	- 1.5	117.5	113.6	+ 3.4

Source: U.S. Bureau of Labor Statistics

CONSUMER BUYING HABITS

The following table, using data collected by MRCA Information Services, is an approximation of men's wear purchases by month. It shows, for example, that in January an average of 96 pairs of jeans were purchased per 1,000 households. Multiplying the purchase rate shown for a particular category each month by the number of households in a given area yields an estimate of the quantity actually purchased. These numbers reflect the large volume of men's wear purchases that can be expected in the summer months and at Christmastime.

Average Purchase Rate (in Units) Per 1,000 Households

	Avg. Month	Jan.	Feb.	Mar.	Apr.	May	June	July	Aug.	Sept.	Oct.	Nov.	Dec.
Shirts/Sweaters	660.5	410.7	399.8	502.2	416.4	470.9	817.5	583.1	595.9	533.7	608.7	776.9	1,810.8
Pants/Slacks/Shorts	227.1	131.6	122.8	200.2	211.4	261.9	433.5	248.4	236.1	201.1	137.4	181.1	359.9
Jeans	154.8	96.1	101.5	142.8	127.7	101.7	150.9	145.0	220.1	171.3	120.6	155.7	324.7
Swimwear/Sweats	73.0	43.1	50.5	63.4	34.4	54.7	91.6	56.8	43.5	60.4	61.9	119.1	196.9

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

Percent of Men's Sportswear Purchases By Price

	Under $10	$10-19.99	$20-29.99	$30-39.99	$40-49.99	$50 & Over
Light jackets	12.6%	32.0	24.6	14.8	5.1	10.9
Slacks	11.3%	51.6	28.1	5.8	1.7	1.5
Jeans	12.6%	74.6	11.0	1.7	0.1	—
Sweaters	22.2%	49.3	18.3	6.9	2.0	1.2
Sport shirts	58.5%	34.7	5.7	0.9	0.1	—
Swimsuits	63.4%	30.6	5.9	1.1	—	—
Warmups	6.3%	34.6	31.1	13.5	9.2	5.3

Source: Newspaper Advertising Bureau,
1986 Newspaper Advertising Planbook

The buying habits of 25-35 year old males was explored in a Gallup survey undertaken for Apparel Merchandising (October 1985). Results show that 45% of these baby boomers spent between $100 and $299 on sportswear in 1985. More than half reported that they purchased sportswear in department stores, with men's specialty stores frequented by 21%. Purchasers of active sportswear frequent sporting goods stores most (42%), followed by department stores.

Percent of Annual Men's Sportswear Expenditures By Price, 1985
(Males 25-35 Years Old)

Amount Spent During Year	All Sportswear	Active Sportswear
Less than $100	17%	38%
$100 - $199	23	33
$200 - $299	22	14
$300 - $399	11	6
$400 - $499	5	4
$500 - $999	11	--
$1,000 - $1,999	4	--
$2,000 - $2,999	--	--
$3,000 or more	--	--
Don't know	7	5

Source: The Gallup Organization,
(Apparel Merchandising, October 1985)

Purchases of Men's Sportswear By Store Type By Males 25-35 Years Old, 1985

	All Sportswear			Active Sportswear		
		Annual Income			Annual Income	
	Total	Under $30,000	Over $30,000	Total	Under $30,000	Over $30,000
Department stores	51%	50%	54%	36%	35%	38%
Men's specialty stores	21	16	28	8	7	9
Mass merchandisers	12	17	7	6	9	4
Discount stores	10	14	4	8	13	4
Sporting goods stores	9	8	11	42	35	47
Off-price/factory outlets	2	2	2	2	--	3
Catalog/mail order	1	--	2	1	2	--
Other	2	2	2	2	3	2
Don't know	3	2	3	3	3	3

Note: Percentages add to more than 100% due to multiple responses.

Source: The Gallup Organization,
(Apparel Merchandising, October 1985)

Jeans

According to a study done on the men's jeans market by The Gallup Organization (Apparel Merchandising, February 1986), about two-thirds of the adult males surveyed plan on buying denim jeans in 1986. These men prefer basic straight-leg/five-pocket jeans over other styles by a wide margin, regardless of age and geographic location. 46% expect to pay up to $19.99 for a pair, with 67% of the men reporting that they usually buy at sale price. By fabric choice, 67% plan to purchase all-cotton, 15% a polyester/cotton blend and 10% stretch denim. Unwashed and prewashed rank equally as the denim finish of choice.

Expected Purchase Price For Men's Jeans, 1986

		Age Group					Income		
	Total	18-24	25-34	35-49	50-64	65 & Over	Under $15,000	$15,000 $30,000	Over $30,000
Under $15	11%	4%	8%	12%	22%	17%	6%	11%	11%
$15-$19.99	35	44	37	32	24	46	47	40	30
$20-$24.99	23	26	25	23	18	13	24	20	25
$25-$29.99	15	17	17	14	13	—	9	15	17
$30-$34.99	6	1	5	9	5	13	—	6	8
$35-$39.99	3	4	3	3	4	—	1	2	6
$40.00-$59.99	1	3	1	1	—	—	—	2	1
Don't know	6	1	4	6	14	11	13	4	2

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

CONSUMER BUYING HABITS

Jeans

Anticipated Purchases of Men's Jeans By Age of Male Purchaser, 1986

		Age of Male Purchaser				
Number of Pairs	Total	18-24	25-34	35-49	50-64	65 & Over
None	34%	16%	11%	31%	50%	76%
One	12	6	17	16	11	1
Two	19	25	22	22	13	12
Three	10	15	13	12	5	5
Four	7	10	9	5	11	--
Five	4	11	4	3	1	--
Six	4	5	7	2	2	--
Seven or more	5	9	9	4	3	--
Don't know	5	3	8	5	4	6

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Brand Preferences in the Purchase of Men's Jeans By Age and Region, 1986

		Age Group					Region			
	Total	18-24	25-34	35-49	50-64	65 & Over	East	Midwest	South	West
Levi's	49%	79%	51%	42%	30%	25%	44%	44%	49%	61%
Lee	18	18	22	17	8	25	29	25	13	4
Wrangler	13	10	14	22	3	13	17	12	14	9
Calvin Klein	6	4	7	6	5	4	5	6	9	3
Jordache	5	6	4	4	5	—	7	6	9	3
Private label	3	—	5	3	4	4	2	4	—	7
Other	6	6	7	7	—	8	7	6	4	2
No preference	24	6	18	29	47	21	24	24	28	19
Don't know	5	—	8	6	5	13	7	7	3	6

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Type of Denim Finish Preferred For Men's Jeans, 1986

		Age Group					Region			
	Total	18-24	25-34	35-49	50-64	65 & Over	East	Midwest	South	West
Unwashed/rigid	47%	43%	55%	41%	46%	33%	40%	45%	43%	59%
Prewashed	46	52	38	50	52	46	50	50	49	34
Stonewashed	6	10	12	—	1	—	9	2	6	7
Don't know	5	1	4	7	3	21	7	9	2	5

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(Apparel Merchandising, February 1986)

Type of Fabric Preferred For Men's Jeans, 1986

	Age Group					
	Total	18-24	25-34	35-49	50-64	65 & Over
All-cotton denim	67%	71%	77%	63%	53%	58%
Polyester/cotton blend	15	15	9	18	20	25
Stretch denim	10	5	9	13	15	4
Does not look at fabric content	6	12	5	2	9	4
Don't know	6	5	7	6	4	13

Note: Percentages add to more than 100% due to multiple answers.

Source: The Gallup Organization,
(*Apparel Merchandising*, February 1986)

Sweaters

Sweaters are clearly one of the growth areas of men's sportswear. According to MRCA, sales reached $1.8 billion in 1985, a gain of more than 6% for the year. Data on buying habits of men's sweaters was covered in a Gallup Organization study (*Apparel Merchandising*, March 1984). It showed a wide consumer preference for purchasing sweaters in department stores, where the proliferation of private label brands may account for more than half of the mix in some stores.

Men's Sweater Purchases By Age of Purchaser
(Most recent purchase)

	18-24	25-34	35-44	45 & over
Department store	39%	42%	37%	40%
Specialty store	19	15	10	8
J.C. Penney	6	3	10	6
Discount store	4	5	9	5
Sears	5	4	7	4
Off-price/factory outlet	2	2	--	1
Mail order/catalog	--	1	1	--
Other	12	4	5	4
Don't know	13	24	21	32

Source: The Gallup Organization

Men's Sweater Purchases -- Sale Price Vs. Regular Price
(Most recent purchase)

		Age Group				Household Income			
	Total	18-24	25-34	35-44	45 & Over	Under $10,000	$10,000 $14,999	$15,000 $24,000	$25,000 & Over
Bought on sale	29%	30%	33%	36%	23%	20%	26%	32%	33%
Bought at regular price	37	48	42	35	32	27	31	43	39
Don't know	34	22	25	30	44	52	44	25	28

Source: The Gallup Organization

Price Paid for Most Recent Men's Sweater Purchase

		Age Group				Household Income			
	Total	18-24	25-34	35-44	45 & Over	Under $10,000	$10,000 $14,999	$15,000 $24,999	$25,000 & Over
Less than $20	22%	21%	24%	24%	22%	19%	21%	30%	20%
$20 - $29	26	33	26	31	20	14	19	26	29
$30 - $49	13	17	17	14	10	7	9	13	18
$50 or more	4	6	6	3	4	2	2	4	8
Don't know	35	23	27	28	44	58	49	27	25

Source: The Gallup Organization

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

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Prepared by
Market Research Division
Audrey S. Balchen, Director
Gregory Becker, Research Analyst

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WOMEN'S, MISSES', JUNIORS' SPORTSWEAR/CASUAL WEAR

MARKET TRENDS

Overall performance at the retail level in women's sportswear/casual wear has generally been flat in recent months, and the outlook for 1986 is for only a moderate gain compared to 1985. However, this category includes a great variety of merchandise, some of which are registering big gains, including sweaters and activewear.

Kurt Salmon Associates, a New York-based management consulting firm has reported that consumer purchases of sweaters increased 11% in 1985; activewear registered gains of 16% and 15%, respectively. For 1986 Kurt Salmon estimates a gain of 10% in unit purchases of women's sweaters and an 8% gain in activewear.

Sweater fashion developments such as silhouette, color and stitch have been important factors in the growth of this market. They are versatile and enable women to update their wardrobes economically. They lend themselves to "impulse" buying and multiple purchases.

As the popularity of sweaters enters its third year, retailers are stepping up efforts to benefit. Private label programs have been increased, and it is estimated that about 25% of all sweater sales are now in private label merchandise. This share is growing among the large merchandisers, and as a result, many sweater resources are looking to specialty store distribution to maintain profit margins.

Fleecewear items have been doing well -- both in active "sweats" and, more recently, in updated street or fashion activewear. The fleece category is expected to continue growing through 1987 as more suppliers come into the market with the new fashion looks and strong colors.

Some lines of women's sportswear are very successful, such as Liz Claiborne. However, as noted in sweaters, the highly competitive nature of the market, the discounting of branded lines and the widening availability of lines in competitive outlets, has led many large retailers to develop private label programs in a variety of sportswear items. These are either sourced abroad because of price and/or styling advantages, or obtained through branded resources in the U.S.

New looks in denim are expected to stimulate consumer interest in sportswear/ casual wear and to result in gains in moderate-priced (main floor) and upstairs departments. Trendy designs are expected to perform well in contemporary departments aimed at relatively young, fashion-conscious customers. In activewear, growth is expected in fashion active that can be used for street or leisure wear, as well as for active sports. Another strong area is aerobic wear.

A number of U.S. large manufacturers are also large importers. Liz Claiborne, for example, imported 84% of its total supply in 1985; Reebok, which recently established a new division to produce active lifestyle apparel, will produce all of the line overseas. For its part, the U.S. industry is stepping up efforts to become more competitive with foreign suppliers.

Included in these efforts is the use of foreign plants to assemble finished garments which are cut in U.S. plants. When the assembled garments are returned to the U.S., duty need be paid only on the value added overseas, under the 807 rule in the Tariff code.

A public relations campaign aimed at making U.S. consumers look for the "Made in the U.S.A." label is well underway, and manufacturers have also stepped up efforts to speed up deliveries to retailers -- a key element in the fast-changing, multi-product sportswear/casual wear field. Branded manufacturers are also working directly with large retailers to supply U.S.-made private labels as well as their branded lines.

AT THE MANUFACTURER LEVEL

GENERAL INDUSTRY STATISTICS

A measure of trends in the women's, misses' & juniors' blouse segment of sportswear/casual wear is developed in the annual report, U.S. Industrial Outlook, compiled by the International Trade Administration.

The value of industry shipments of women's blouses and shirts decreased 10% in real value in 1985, compared with a 12% drop in 1984. On a current dollar basis, the decline in 1985 was estimated at 4.4%.

Women's, Misses' & Juniors' Blouse Industry Trends 1982-1985
(Value in millions of dollars)

	1985(e)	1984	1983	1982	% Change 1985/84	% Change 1984/83	% Change 1983/82
Value of U.S. industry shipments:							
Current $	$3,291	$3,442	$3,804	$3,896	- 4.4%	- 9.5%	- 2.4%
Constant (1982) $	2,874	3,193	3,628	3,896	-10.0	-12.0	- 6.9

(e) estimated

Source: U.S. Department of Commerce,
International Trade Administration
1986 U.S. Industrial Outlook

A complete census of all manufacturers in the U.S. which have one or more paid employees is compiled every five years by the U.S. Bureau of the Census. Results from the latest, covering operations in industries primarily involved in the production of women's sportswear, casual wear and jeans in 1982 are covered below. In addition, comparable figures are reported from the 1983 annual survey of manufactures. The Census Bureau conducts annual surveys using a sample of manufacturers in order to develop estimates on key measurements of manufacturing activity in intercensal periods.

Sportswear/casual wear is not a clearly defined industry classification, but is included in a number of industry classifications under the Standard Industrial Classification system. In some cases, such as Knit Outerwear Mills, industry data covers manufacturers of apparel for men and women, as well as children.

In 1983 compared with 1982, the value added by manufacture in knit outerwear mills increased 8.1%. Value added within the women's, misses' and juniors' outerwear industry increased 4.6%; in the blouse industry, value added within the industry registered a decline of 3.8% in 1983.

GENERAL INDUSTRY STATISTICS

Women's, Misses' & Juniors' Blouse Industry (SIC 2331*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	1,825	1,297	—
Number of establishments, total**	na	1,711	1,955	1,422	- 12.5%**
With 20 or more employees	na	994	1,111	959	- 10.5**
Employees, total (thous.)	91.5	93.1	92.3	83.8	- 0.9
Production workers (thous.)	76.5	79.3	79.4	74.2	- 3.6
Payroll (mil. $)	$ 897.4	$ 921.2	$ 876.1	$ 572.2	+ 2.4
Value added by manufacture, (mil. $)#	1,738.3	1,774.2	1,843.6	1,198.6	- 5.7
Value of industry shipments, (mil. $)##	3,579.3	3,804.1	3,896.2	2,344.2	- 8.1
Capital expenditures, new (mil. $)	72.5	40.2	29.4	24.3	+146.6

Women's, Misses' & Juniors' Outerwear, n.e.c. (SIC 2339*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	1,595	1,634	—
Number of establishments, total**	na	1,549	1,746	1,802	- 11.3%**
With 20 or more employees	na	969	1,039	1,072	- 6.7**
Employees, total (thous.)	108.3	108.2	110.9	104.4	- 2.3
Production workers (thous.)	92.1	90.8	93.5	88.3	+ 1.5
Payroll (mil. $)	$1,151.1	$1,109.9	$1,099.0	$ 735.3	+ 4.7
Value added by manufacture, (mil. $)#	2,597.6	2,365.7	2,261.2	1,579.5	+ 14.9
Value of industry shipments, (mil. $)##	5,239.0	4,847.5	4,833.9	3,294.7	+ 8.4
Capital expenditures, new (mil. $)	50.2	51.9	85.4	42.4	- 41.2

Knit Outerwear Mills (SIC 2253*)

	1984	1983	1982	1977	% Change 1984/1982
Number of companies	na	na	893	903	—
Number of establishments, total**	na	852	923	953	- 7.7%**
With 20 or more employees	na	422	482	551	- 12.4**
Employees, total (thous.)	67.8	74.5	66.8	73.0	+ 1.5
Production workers (thous.)	57.2	63.4	55.9	62.7	+ 2.3
Payroll (mil. $)	$ 835.0	$ 862.3	$ 741.4	$ 582.0	+ 12.6
Value added by manufacture, (mil. $)#	1,906.4	1,842.6	1,704.8	1,159.5	+ 11.8
Value of industry shipments, (mil. $)##	3,607.1	3,410.0	3,182.4	2,335.9	+ 13.3
Capital expenditures, new (mil. $)	116.6	63.8	53.5	49.9	+117.9

na not available
n.e.c. not elsewhere classified

* Manufacturers are classified by industry under the Standard Industrial Classification (SIC) system determined by the principal product made, as defined below:

SIC 2331 comprises establishments primarily engaged in the manufacturing of women's, misses' and juniors' blouses, waists and shirts.

(footnotes continued)

GENERAL INDUSTRY STATISTICS

SIC 2339 includes manufacturing establishments primarily engaged in the manufacture of women's, misses' and juniors' outerwear, not elsewhere classified, such as neckwear, swimwear, slacks, ski suits, sweaters, and outerwear sport shirts, cut and sewn from purchased woven or knit fabric; also washable service apparel.

SIC 2253 includes establishments making knit outerwear for men and boys, as well as women and children. Separate industry figures are not available, as most mills produce for men, women and children.

NOTE: Industry data on manufacturers of women's skirts, pants, pantsuits and jackets is combined in SIC 2337 with data on manufacturers of women's coats and suits. The SIC is covered in the Women's Coats and Suits Fact File.

** Covers manufacturing establishments only, and each location is separately counted. Not included are separate auxilary locations serving the plants (i.e. administrative offices, purchasing offices, sales promotion offices, etc.). Data on number of establishments in 1983 are from the Census Bureau's County Business Patterns.

# Value added by manufacture is derived by subtracting the cost of products bought for resale without further manufacture, the cost of piece goods and other materials, contract work, etc., from the value of shipments, with adjustments for finished products inventories. It avoids duplication in value of production which results from the use of products of some manufacturing establishments as materials by others, and is for most purposes the best value measure of individual industries.

## Value of industry shipments includes, along with receipts for contract work, all items made for or by each establishment from materials owned by it, and also miscellaneous receipts. It includes both primary and secondary products made by manufacturers in these industries. The value of primary product shipments, alone, plus the value of these shipments by manufacturers classified in other industries, is covered in the section on PRODUCT SHIPMENTS.

** Covers 1983/1982.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
1983 Annual Survey of Manufactures

Employment & Earnings

The apparel industry is labor-intensive, and manufacturing costs in the U.S. are very high compared with major apparel shippers abroad, particularly Taiwan, Hong Kong and Korea, as well as emerging suppliers to the U.S. market. In reaction to the sharp growth in apparel imports, U.S. manufacturers have consolidated operations in the U.S., streamlined and improved their production and marketing procedures in order to cut costs. In addition, deliveries have been sped up to get a competitive edge over imports.

Employment & Earnings (continued)

U.S. firms are also making use of "sourcing" -- that is, engaging suppliers outside the firm to furnish some or all components at various stages of the manufacturing process, and these suppliers are foreign producers, as well as domestic producers. Esprit, for example, which is a major U.S. firm in the sportswear/casual wear category, produces about 95% of its apparel in Asia. Reebok, the footwear company which is now becoming a strong force in activewear, produces its products overseas. A major U.S. producer, Liz Claiborne, Inc., sources internationally (accounting for 84% of its total units in 1985); 25% of Kayser Roth apparel is imported.

Some manufacturers are taking advantage of the "807" law, by which a U.S. apparel firm is allowed to cut fabric for the various parts of a garment, ship the parts to a foreign country for assembly, then import the finished garment, paying duty on the value added to the cut pieces. In addition, some large U.S. apparel firms have wholly-owned or jointly-owned overseas plants.

All of these developments, plus a decline in the export market, have led to a sharp cutback in employment in the U.S. apparel industry. From an average of 64,000 in 1979, employment in the women's blouse industry declined steadily, reaching an average of 53,300 in 1985. In the women's outerwear, n.e.c. industry, employment in the same period dropped from a high of 149,400 in 1979 to 140,600 in 1985. In knit outerwear mills -- with a large share of output concentrated in women's sportswear/casual wear -- employment averaged 78,600 in 1978. By 1985, the level had dropped to 63,600. As noted in the following table, the downward trend in the number employed in key sportswear/casual wear industries has continued in 1986.

Employment & Earnings in Selected Women's Sportswear & Separates Industries

	April Average			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
Women's, misses' & juniors' blouses (SIC 2331*):						
All employees (thous.)	51.7	52.9	- 2.3%	53.3	58.6	- 9.0%
Production workers (thous.)	43.0	44.2	- 2.7	44.6	49.9	- 10.6
Average weekly earnings	$175.44	$172.89	+ 1.5	$178.52	$175.08	+ 2.0
Average hourly earnings	5.10	5.10	—	5.13	5.06	+ 1.4
Average weekly hours	34.4	33.9	+ 1.5	34.8	34.6	+ 0.6
Women's, misses' & juniors' outerwear, n.e.c. (SIC 2339*):						
All employees (thous.)	170.9	172.9	- 1.2	169.1	160.3	+ 5.5
Production workers (thous.)	143.8	144.7	- 0.6	140.6	134.5	+ 4.5
Average weekly earnings	$188.51	$189.56	- 0.6	$191.17	$186.71	+ 2.7
Average hourly earnings	5.31	5.37	- 1.1	5.34	5.23	+ 2.1
Average weekly hours	35.5	35.3	+ 0.6	35.8	35.7	+ 0.3
Knit outwear mills (SIC 2253*):						
All employees (thous.)	66.7	62.4	- 6.9	63.6	66.3	- 4.1
Production workers (thous.)	58.5	54.2	- 7.9	43.0	45.5	- 5.5
Average weekly earnings	$240.54	$219.24	+ 9.7	$228.46	$215.97	+ 5.8
Average hourly earnings	6.33	6.09	+ 3.9	6.06	5.79	+ 4.7
Average weekly hours	38.0	36.0	+ 5.6	37.7	37.3	+ 1.1

See page 4 for definition of SIC codes.
n.e.c. not elsewhere classified.

Source: U.S. Bureau of Labor Statistics

GENERAL INDUSTRY STATISTICS

Industry Concentration

As in most other industries in the U.S., mergers and acquisitions are becoming commonplace among firms making sportswear/casual wear. Most recently, VF Corporation, manufacturer of Lee jeans, agreed to buy Blue Bell, the maker of Wrangler jeans, for about $800 million. This sale is expected to make VF the leading jeans manufacturer, controlling 25% of the market, including both men's and women's. Levi Strauss, the current leader, presently has about 22% market share. When the purchase is completed. VF will own, in addition to the Lee Brand, Wrangler, Rustler and Girbaud jeans. They will also acquire Jantzen sportswear, Red Kap work clothes and Jansport outdoors wear.

As part of the complete census of manufactures covering operations in 1982, the U.S. Census Bureau has compiled data on industry concentration levels. Competitive pressure, mergers and acquisitions have resulted in fewer companies and greater concentration of industry activity since 1982.

Single & Multiunit Companies' Share of Shipments, 1982

		Plants		Employees		Value of Industry Shipments	
	Companies	No.	%	Thous.	%	Thous. $	%
Women's & misses' blouses	1,824	1,954	100.0%	92.2	100.0%	$3,884.2	100.0%
Multiunit companies	140	270	13.8	30.0	32.5	1,653.7	42.6
Single unit companies	1,684	1,684	86.2	62.2	67.5	2,230.5	57.4
Women's, misses' outerwear, n.e.c.	1,592	1,745	100.0	110.7	100.0	$4,830.4	100.0
Multiunit companies	185	338	19.4	54.6	49.3	2,607.0	54.0
Single unit companies	1,407	1,407	80.6	56.0	50.7	2,223.4	46.0
Knit outerwear mills	896	923	100.0	66.8	100.0	$3,182.4	100.0
Multiunit companies	106	133	14.4	38.1	57.0	2,095.9	65.9
Single unit companies	790	790	85.5	28.7	43.0	1,086.4	34.1

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census,
1982 Census of Manufactures,
Type of Organization, Subject Series MC82-S-5

GENERAL INDUSTRY STATISTICS

Industry Concentration (continued)

Share of Value of Industry Shipments Accounted For By the Largest Companies

		Value of Industry Shipments*				
	No. of Companies	Total (mil. $)	Percent accounted for by largest companies:			
Industry			4 largest	8 largest	20 largest	50 largest
Women's & misses' blouses:						
1982	1,824	$3,884.2	8%	14%	27%	44%
1977	1,292	2,333.6	12	18	30	47
1972	890	1,254.9	18	26	38	55
Women's & misses outerwear n.e.c.:						
1982	1,592	4,830.4	23	22	34	49
1977	1,625	3,285.1	14	20	33	50
1972	1,247	1,638.0	18	25	37	52
Knit outerwear mills:						
1982	896	3,182.4	19	29	45	64
1977	903	2,335.8	17	27	46	63
1972	882	1,703.8	16	26	44	59

n.e.c. not elsewhere classified
*For an explanation of terms see page 4.

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Smaller manufacturing plants, based on number of employees, account for a larger share of shipments of blouses than noted for the two other industry segments covered in Census Bureau data. Plants with 100 or more employees in the blouse industry (12.6% of the total) accounted for just over 40% of the value of industry shipments in 1982. Comparable figures in the outerwear n.e.c. industry were 17.1%/58.8%; and in knit outerwear, 15.1%/73.1%.

Concentration by Employment Size, 1982

	Establishments		Value Added By Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Women's & misses blouse industry--	1,955	100.0%	$1,843.6	100.0%	$3,896.2	100.0%
By establishment (plant) size:						
Under 20 employees	844	43.2	196.8	10.7	496.5	12.1
20 - 49 employees	508	26.0	360.1	19.5	855.1	21.9
50 - 99 employees	357	18.3	462.7	25.1	971.7	24.9
100 or more employees	246	12.6	823.9	44.7	1,572.8	40.4

(continued)

Industry Concentration (continued)

Concentration by Employment Size, 1982 (continued)

	Establishments		Value Added By Manufacture*		Industry Shipments*	
	Number	%	(Mil. $)	%	(Mil. $)	%
Women's & misses outerwear n.e.c. industry--	1,746	100.0	2,261.2	100.0	4,833.9	100.0
By establishment (plant) size:						
Under 20 employees	707	40.5	138.8	6.1	361.5	7.7
20 - 49 employees	461	26.4	318.2	14.1	751.3	15.5
50 - 99 employees	280	16.0	418.5	18.5	879.2	18.2
100 or more employees	298	17.1	1,385.7	61.3	2,841.9	58.8
Knit outerwear mill industry--	923	100.0	1,704.8	100.0	3,182.4	100.0
By establishment (plant) size:						
Under 20 employees	441	47.8	120.8	7.1	272.7	8.6
20 - 49 employees	223	24.2	143.7	8.4	273.4	8.6
50 - 99 employees	120	13.0	158.0	9.3	309.3	9.7
100 or more employees	139	15.1	1,282.3	75.2	2,327.0	73.1

n.e.c. not elsewhere classified
*For an explanation of terms, see page 4.

Source: U.S. Bureau of the Census
1982 Census of Manufactures

Number of Women's Sportswear & Casual Wear Manufacturing Establishments By Employment Size, 1983

	Women's, Misses' & Juniors:		
	Blouses (SIC 2331)	Outerwear n.e.c. (SIC 2339)	Knit Outwear Mills (SIC 2253)
Total establishments	1,711	1,549	852
Number of employees:			
Under 10 employees	438	361	276
10 - 49 employees	734	411	347
50 - 99 employees	312	275	112
100 - 499 employees	218	265	98
500 or more employees	9	18	19

n.e.c. not elsewhere classified.

Source: U.S. Bureau of the Census
County Business Patterns, 1983

GENERAL INDUSTRY STATISTICS

Plant Capacity Utilization

For the fourth quarter of 1984, knit outerwear mills in the U.S. operated at 73% of the industry's preferred rate, compared with an operating rate of 76% of the preferred level in the fourth quarter of 1983. (The preferred level is defined as a level, normally between actual operations and practical capacity, which the manufacturer would prefer not to exceed due to costs or other considerations). The following figures represent the ratio of actual utilization to the preferred level of operations.

Capacity Utilization Rates: Fourth Quarters 1981 - 1984

	1984	1983	1982	1981
Women's, misses' & juniors blouses	nr	93	83	92
Women's, misses' & juniors' outerwear, n.e.c.	nr	92	84	92
Knit outerwear mills	73	76	88	80

nr not reported
n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
Current Industrial Reports:
Survey of Plant Capacity, 1984 MC-C1(84)1

Location of the Industry

The following table, based on the 1982 census of manufactures, covers the states which lead in the value added by manufacture in plants classified in industries related to women's sportswear/casual wear.

Industry Statistics For Leading States, 1982

	All Plants		Employees		Value Added By Manufacture	
Industry	Total	With 20+ Employees	No. (thous.)	%	Mil. $	%
Women's, misses' & juniors' blouses, U.S. total	1,955	1,111	92.3	100.0%	$1,843.6	100.0%
Leading states:						
California	504	210	14.8	16.0	414.4	22.5
New York	444	196	11.4	12.4	405.3	22.0
Pennsylvania	292	242	19.0	20.6	248.6	13.5
North Carolina	73	55	6.3	6.8	104.2	5.7
New Jersey	122	54	4.0	4.3	96.7	5.2

(continued)

Location of the Industry (continued)

Industry Statistics For Leading States, 1982
(continued)

Industry	All Plants Total	All Plants With 20+ Employees	Employees No. (thous.)	Employees %	Value Added By Manufacture Mil. $	Value Added By Manufacture %
Women's, misses' & juniors' outerwear, n.e.c., U.S. total	1,746	1,039	110.9	100.0%	$2,261.2	100.0%
Leading states:						
New York	459	241	15.9	14.3	584.4	25.8
California	372	188	15.8	14.2	366.4	16.2
Texas	70	46	9.3	8.4	184.8	8.2
Pennsylvania	122	93	9.1	8.2	123.4	5.5
Georgia	56	41	4.8	4.3	108.9	4.8
Knit outerwear mills						
U.S. total	923	482	66.8	100.0	$1,704.8	100.0
Leading states:						
Pennsylvania	88	63	13.2	19.8	331.4	19.4
North Carolina	51	32	11.1	16.6	325.1	19.1
New York	416	178	11.4	17.1	297.6	17.5
New Jersey	82	46	3.3	4.9	71.5	4.2
California	73	32	2.6	3.9	56.9	3.3

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
Current Industrial Reports
Industry Series MC82-I-22B; MC82-I-23B

PRODUCTION

U.S. production of women's sportswear/casual wear, in general, has continued to decline, even though the official U.S. Department of Commerce definition includes garments cut here but sewn abroad -- output of which has grown rapidly in recent years. In addition, production data, according to the International Ladies Garment Workers Union research department, are believed to include a growing amount of garments imported by domestic manufacturers, reported in error as domestic production. The ILGWU believes that U.S. output of women's wear is overstated for these reasons.

Sweaters have become a very important fashion item in the last couple of years, and pullover sweater production has been a noteworthy exception in the general decline. Production in 1985 was up 16% compared with 1984, and in the first four months of 1986, the Census Bureau reported shipments of women's sweaters by U.S. producers rose 55% compared with the same 1985 period.

PRODUCTION

Fleecewear, including sweat pants and warmups, also showed good results in 1985. Production of sweat pants rose 25% and warmups or jogging suits gained 10.1% compared with 1985. Now fleecewear has taken on a strong fashion significance and makers are rushing to step up production of both basic performance fleecewear and casual fleecewear with updated fashion looks and vibrant colors. These are expected to register strong results at Spring 1987 markets.

In the first four months of 1986, output of knit shirts gained 10%, and fashion trends continue to favor knits. Production of skirts in the same period gained 10.4%, according to preliminary Census Bureau counts. The sudden growth in popularity of denim should help the woven fabric sportswear/casual wear market, leading to new updated looks.

The longterm trend in production in U.S. plants has been compiled by the ILGWU, with figures benchmarked to the Census of Manufactures and including small plants (generally with fewer than five employees) which are not included in the Census Bureau's Current Industrial Reports. The general downtrend is expected to continue, despite possible restrictions in imports resulting from bilateral agreements on quota restrictions, as U.S. firms produce overseas and retailers increasingly source merchandise abroad for rapidly growing private label programs.

Unit Production of Specified Women's Sportswear/Casual Wear,
Selected Years, 1972-1984
(Millions of units)

	1984(p)	1982	1980	1979	1977	1974	1972
Women's, misses', juniors'							
Jackets (tailored & nontailored	37.4	45.4	33.4	26.4	27.0	28.6	20.5
Blouses	370.9	396.2	402.3	406.8	323.9	241.8	215.3
Knit sport shirts	131.7	161.6	161.2	162.5	154.3	100.4	86.3
Sweaters	94.3	86.0	77.8	78.2	95.3	85.9	79.7
Skirts	111.5	118.8	86.1	75.3	59.9	54.8	66.2
Pants	199.6	208.3	218.6	213.2	196.9	181.0	139.8
Jeans, dungarees	109.5	107.3	100.8	90.1	80.4	77.0	65.8
Playgarments	49.7	52.5	30.2	33.0	29.7	29.8	33.5
Swimwear	41.7	41.9	32.8	35.8	30.2	21.9	24.1

(p) preliminary

Note: ILGWU figures are benchmarked to the Census of Manufactures and include production by manufacturers with one or more paid employee.

Source: Research Department, International Ladies' Garment Workers' Union Conditions in the Women's Garment Industry (Dec. 4, 1985)

PRODUCTION

A report issued by the Census Bureau in July 1986 includes the following data on unit production in 1985 compared with 1984 revised figures. The figures are developed through a mail survey of all known U.S. manufacturers and jobbers with the exception of very small plants (usually fewer than five employees). The Current Industrial Reports includes garments assembled abroad and shipped back to U.S. cutters under the terms of item 807 of the Tariff Schedule.

Summary of Production of Women's, Misses' & Juniors' Sportswear/Casual Wear: 1984, 1985

(Thousands of dozens, unless otherwise specified)

	1985	1984(r)	% Change 1985/84
Total, specified apparel (thous. doz.)	78,682	82,703	- 4.9%
Blouses & shirts	31,234	33,940	- 8.0
Woven	21,216	21,995	- 3.5
Knit	10,018	11,945	-16.1
Sweaters	7,562	6,609	+14.4
Pullovers	7,127	6,146	+16.0
Coat and cardigan	435	463	- 6.0
Separate tailored suit type jackets	24,022*	29,451*	-18.4
Nontailored outer jackets, excluding ski	2,688*	2,519*	+ 6.7
Vests, excl. sweater vests*	813*	1,323*	-38.5
Skirts*	93,577*	97,529*	- 4.1
Slacks, excl. dungarees & jeans	157,460*	163,200*	- 3.5
Jeans & dungarees*	84,982*	87,302*	- 2.7
Activewear:			
Sweat shirts	1,487	1,564	- 4.9
Sweat pants	961	769	+25.0
Warm-up or jogging suits	740	672	+10.1
Swimsuits	2,695	3,258	-17.3
Ski jackets, incl. ski vests	26	46	-43.5
Ski pants	10	12	-16.7
Team sport uniforms	326	488	-33.2
Body suits & body shirts	265	346	-23.4
Playwear:			
Shorts, including jogging & tennis	2,603	3,223	-19.2
Playsuits, beach tops, halters and other playgarments	477	518	- 7.9

(r) revised
* thousands of units
na not available

Source: U.S. Bureau of the Census
Current Industrial Reports
Women's & Children's Outerwear MA23F(85)

PRODUCTION

By Fabric/Construction

The percent distribution of 1984 and 1983 cuttings of women's sportswear by type of fabric and construction is covered in the following tables. However, this information is not always reported, although in 1985 an improvement in the level of reporting was noted.

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric, & By Construction, 1983 - 1985

	1985	1984	1983
Woven blouses & shirts	100.0%	100.0%	100.0%
By fabric:			
All cotton & chiefly cotton	26.1	23.4	20.7
All manmade & chiefly manmade	64.4	56.3	57.4
All wool & chiefly wool	0.2	0.2	0.4
All other fabric	4.3	4.7	5.3
Not specified	5.0	15.3	16.2
Knit blouses & shirts	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	25.8	29.4	26.9
All manmade & chiefly manmade	67.1	52.2	52.1
All wool & chiefly wool	2.2	2.2	2.0
All other fabric	1.4	2.1	0.6
Not specified	3.6	14.2	18.5
Pullover sweaters	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	52.3	30.4	24.2
All manmade & chiefly manmade	41.6	50.8	58.3
All wool & chiefly wool	2.3	3.3	5.0
Not specified	3.8	15.4	12.5
Coat and cardigan sweaters	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	8.7	3.3	2.1
All manmade & chiefly manmade	82.5	76.8	73.9
All wool & chiefly wool	4.6	4.2	6.6
Not specified	4.1	15.8	17.4
Separate tailored suit-type jackets	100.0	100.0	100.0
By construction:			
Woven	65.0	61.0	62.5
Knit	30.8	25.2	25.5
Not specified	4.2	13.7	12.0
By fabric:			
All cotton & chiefly cotton	9.1	7.5	9.8
Manmade/wool blends, chiefly manmade	6.3	7.9	58.7
All manmade & chiefly manmade, except manmade/wool blends	61.5	57.4	
All wool & chiefly wool	18.5	14.7	16.6
All other fabrics	2.1	1.1	1.1
Not specified	2.8	11.4	13.7

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric & By Construction, 1983 - 1985

(continued)

	1985	1984	1983
Nontailored outer jackets, excluding ski	100.0%	100.0%	100.0%
By construction:			
Woven	85.8	50.1	45.8
Knit	14.2	49.9	54.2
Not specified			
By fabric:			
All cotton & chiefly cotton	5.5	7.2	7.5
All manmade & chiefly manmade	62.9	47.0	51.6
All wool & chiefly wool	17.4	6.8	6.9
All other fabrics			
Not specified	14.2	38.9	34.1
Vests, excluding sweater vests	100.0	100.0	100.0
By construction:			
Woven	49.6	30.7	30.4
Knit	28.5	51.0	55.8
Not specified	21.9	18.3	13.8
By fabric:			
All cotton & chiefly cotton	26.7	13.1	5.6
All manmade & chiefly manmade	38.3	23.3	57.9
All wool & chiefly wool	17.8	6.2	3.6
All other fabrics	17.2	55.3	40.7
Not specified			
Skirts	100.0	100.0	100.0
By construction:			
Woven	80.8	73.0	70.0
Knit	14.6	15.8	18.7
Not specified	4.6	11.3	11.4
By fabric:			
All cotton & chiefly cotton	20.4	17.8	17.0
Manmade/wool blends, chiefly manmade	5.7	3.0	57.3
All manmade & chiefly manmade, except manmade/wool blends	59.2	56.2	
All wool & chiefly wool	11.5	11.4	13.5
All other fabrics	1.8	1.3	1.5
Not specified	1.5	7.3	10.7

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production By Fabric & By Construction, 1983 - 1985

(continued)

	1985	1984	1983
Slacks, except dungarees and jeans	100.0%	100.0%	100.0%
By construction:			
Woven	74.5	65.5	63.4
Knit	20.3	23.9	26.5
Not specified	5.2	10.5	10.1
By fabric:			
All cotton & chiefly cotton	22.3	17.5	15.1
All manmade & chiefly manmade	68.0	68.4	70.8
All wool & chiefly wool	4.7	5.1	5.3
All other fabrics	1.0	0.6	0.7
Not specified	4.1	8.3	8.1
Jeans and dungarees	100.0	100.0	100.0
By fabric:			
All cotton & chiefly cotton	96.7	94.8	95.9
All manmade & chiefly manmade	2.7	4.1	2.9
Not specified	0.6	1.1	1.6
Swim suits	100.0	100.0	100.0
By construction:			
Woven	30.6	17.4	20.4
Knit	55.9	68.6	65.5
Not specified	13.5	14.0	14.1
Shorts, including jogging and tennis	100.0	100.0	100.0
By construction:			
Woven	77.9	69.3	65.9
Knit	15.1	10.7	15.2
Not specified	7.1		
By fabric:			
All cotton & chiefly cotton	36.7	27.4	27.0
All manmade & chiefly manmade	55.8	53.1	55.3
All other fabric	7.5	19.5	17.7
Not specified			
Playsuits, beach tops, halters and other playwear	100.0	100.0	100.0
By construction:			
Woven	20.1	28.9	29.9
Knit	70.4	53.3	52.2
Not specified	9.4	17.8	17.9
By fabric:			
All cotton & chiefly cotton	14.7	25.5	14.3
All manmade & chiefly manmade	59.7	55.4	51.3
All other fabric	25.6	31.5	34.4
Not specified			

(continued)

PRODUCTION

By Fabric/Construction (continued)

Percent Distribution of Women's, Misses' & Juniors' Sportswear Production
By Fabric & By Construction, 1983 - 1985
(continued)

	1985	1984	1983
Washable service apparel, including uniforms, medical lab jackets, smocks, etc.	100.0%	100.0%	100.0%
By construction:			
Woven	75.2	72.2	64.7
Knit	21.8	17.1	22.0
Not specified	3.0	10.7	13.4
By fabric:			
All cotton & chiefly cotton	16.4	7.8	13.6
All manmade & chiefly manmade	80.4	78.8	74.2
All other fabric Not specified	3.2	13.4	12.2

Source: U.S. Bureau of the Census
Women's & Childrens' Outerwear MA23F(84)-1

The Seasonal Pattern in Production

The following table shows the 1985 distribution of production by months in specified types of women's, misses' & juniors' sportswear, based on the Census Bureau's monthly survey.

Monthly Distribution of Reported Cuttings
of Selected Women's Sportswear, 1985

	Tailored Separate Jackets	Skirts	Slacks*	Blouses	Knit Outerwear Sport Shirts	Sweaters**
Total Year	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%
January	9.3	9.2	8.3	8.2	8.2	5.8
February	8.2	8.8	8.2	8.4	8.5	7.0
March	8.3	8.5	9.1	9.0	8.3	6.4
April	8.5	8.2	8.1	8.3	8.0	6.2
May	7.9	8.4	8.8	8.6	8.8	6.8
June	7.8	7.7	8.9	8.3	10.0	7.6
July	7.8	8.0	7.8	8.0	7.9	9.7
August	9.9	8.3	8.6	8.5	8.3	9.7
September	8.4	8.1	8.1	8.3	7.9	8.8
October	8.5	9.6	8.9	9.5	8.9	12.9
November	8.4	7.7	8.3	8.7	7.1	9.8
December	6.9	7.3	6.9	6.1	8.0	9.3

* Includes jeans and dungarees, and jean-cut casual slacks
**Shipments

Source: U.S. Bureau of the Census, Current Industrial Reports
Men's, Women's, Misses' & Juniors' Selected Apparel
M231(86)-1.

Materials Consumed in Production

Materials Consumed By Industry Classification: 1977, 1982
(Delivered costs in millions of dollars)

Industry	1982	1977	% Change 1982/1977
Women's & misses' blouses (SIC 2331*), total	$1,236.9	$ 747.1	+ 65.6%
Broad woven fabrics	476.8	256.1	+ 86.2
Purchased knitted fabrics	257.9	217.4	+ 18.6
All other materials, components & supplies	107.8	79.9	+ 34.9
Unspecified materials, components & supplies	404.4	193.7	+108.8
Women's and misses' outerwear, n.e.c. (SIC 2339*), total	1,638.3	1,191.6	+ 37.4
Broadwoven fabrics	600.7	495.2	+ 21.3
Purchased knitted fabrics	211.0	251.3	- 16.0
All other materials, components & parts	144.6	137.9	+ 4.9
Unspecified materials, components & parts	682.0	307.2	+122.0
Knit Outerwear mills (SIC 2253*), total	1,047.9	887.9	+ 18.0
Purchased knitted fabrics	64.2	90.4	- 29.0
Carded cotton yarns	116.8	36.1	+223.5
Combed cotton yarns	44.2	29.7	+ 48.8
Rayon & acetate spun yarns	6.2	1.7	+264.7
Nylon spun yarns	5.0	8.7	- 42.5
Polyester spun yarns	81.3	34.0	+139.1
Acrylic yarns	138.6	128.0	+ 8.3
Wool yarns	39.9	24.3	+ 64.2
Rayon & acetate filament yarns	1.3	1.4	- 7.1
Nylon filament yarns	16.8	18.1	- 7.2
Polyester filament yarns	25.3	35.2	- 28.1
All other yarns	30.3	24.2	+ 25.2
All other materials, components & parts	229.1	201.2	+ 13.9
Unspecified materials, components & parts	248.9	254.9	- 2.4

*For a definition of SIC codes, see page 4. The above figures cover consumption of materials for all products made within the specified industries.

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Industry Series MC82-1-22B; MC82-1-23B

PRODUCT SHIPMENTS

In contrast with "industry shipments" which have been covered in the section on GENERAL INDUSTRY STATISTICS, and defined on page 4, product shipments cover the value of specific products made by all manufacturers with payroll, including those classified within the industry (primary producers) and those classified in other, unrelated industries (secondary producers).

As previously noted, U.S. manufacturing activity has been depressed due to competition from imported apparel made by foreign producers as well as through the growing practice of large U.S. manufacturers to produce apparel abroad or source finished garments abroad. In addition, U.S. exports have been hurt by the strong dollar, which made U.S. products too expensive for many overseas buyers.

However, domestic producers still maintain a competitive edge in producing coordinated sportswear and collections, and in supplying fast-changing merchandise where quick deliveries to retailers are essential -- particularly those manufacturers who have gained a reputation for quality. The fast-changes in fashions and fads in sportswear/casual wear also result in new, small producers coming in, and leaving the field.

The best performing product categories shipped by U.S. manufacturers last year were in fleecewear -- shipments of sweat pants for women, misses and juniors gained over 42% compared with their value in 1984; shipments of warmups and jogging suits were up almost 29%. Now the big fleece manufacturers are no longer relying on basic sweats, but are moving into fleece apparel with fashion colors and innovative styling -- items to be worn for leisure and street wear, not just for jogging. Large sizes are being offered. The market for fleece wear should show gains in 1986/1987.

Pullover sweaters have been a hot fashion item for the past two years. Imports have a large share of this market but U.S. producers managed to register the best gain (almost 5%) in value of shipments in 1985 reported for any sportswear/casual wear other than sweat pants and warmups/jogging suits. Sweaters of ramie and other vegetable fibers have made up a growing portion of sweater imports. These fibers were not subject to import controls until the revised Multi-Fiber Agreement was signed in August 1986, and domestic sweater mills hope the implementation of this through bilateral agreements will give them relief. (Importers, however, can switch to other blends or source in countries not covered by agreements.)

Manufacturers of trendy, contemporary sportswear/casual wear are doing best, and denim is the fashion-forward fabric, along with knits, for this market, allowing for fresh new looks in tops and bottoms which should do well this year and next.

The value of shipments reported in the Current Industrial Reports issued by the Census Bureau are developed through mail surveys among all known U.S. manufacturers and jobbers, except very small firms (usually with fewer than five employees). Apparel items assembled overseas, but cut in the U.S., which are then sent back to the U.S. producers under the terms of the 807 Tariff regulation are included in the CIR reports, but not apparel items that are produced entirely abroad.

Value of Shipments of Reported Women's, Misses' & Juniors' Sportswear/Casual Wear 1984, 1985

(Millions of dollars)

	1985	1984	% Change 1985/84
Sportswear/casual wear, total	$8,893.5	$9,489.8	- 6.3%
Tops:	4,253.2	4,519.8	- 5.9
Blouses & shirts, woven	2,089.6	2,158.5	- 3.2
Blouses & shirts, knit, exc. sweat shirts	765.9	874.2	- 12.4
Sweaters	611.9	591.7	+ 3.4
Pullovers	565.7	539.3	+ 4.9
Coat & cardigan	46.2	52.4	- 11.8
Separate tailored suit-type jackets	696.3	806.3	- 13.6
Nontailored outer jackets, except ski	76.6	73.1	+ 4.8
Vests, exc. sweater vests	12.9	16.0	- 19.4
Bottoms:	3,756.2	3,964.5	
Skirts	1,136.8	1,193.4	- 4.7
Slacks, exc. jeans & dungarees	1,629.0	1,575.0	+ 3.4
Jeans & dungarees	990.4	1,196.1	- 17.2
Active sportswear:	710.5	765.9	
Sweat shirts	90.9	91.7	- 0.9
Sweat pants	64.1	45.0	+ 42.4
Warm-up or jogging suits	94.5	73.5	+ 28.6
Swimsuits	381.3	442.4	- 13.8
Ski jackets, incl. vests	19.4	27.4	- 29.2
Ski pants	7.3	7.6	- 3.9
Team sports uniforms	21.3	35.1	- 39.3
Body suits and body shirts	31.7	43.2	- 26.6
Playgarments:	173.6	239.6	
Shorts, incl. jogging and tennis	142.3	201.4	- 29.3
Playsuits, beach tops, halters & other playwear	31.3	38.2	- 18.1

Source: U.S. Bureau of the Census
Current Industrial Reports
Women's and Children's Outerwear MA23F(85)-1

PRODUCT SHIPMENTS

Data from the complete census of manufactures covering the quantity and value of shipments by all U.S. producers with payroll in 1982 compared with 1977 is summarized below.

Quantity & Value of Shipments of Women's Sportswear/Casual Wear Shipped By All U.S. Producers: 1977, 1982

(Quantity in thousands of dozens, value in millions of dollars)

	1982		1977	
	Quantity	Value	Quantity	Value
Women's, misses' & juniors'				
Knit sportshirts, incl. sweat	12,369	$ 805.4	na	na
Blouses, shirts	30,223	2,623.4	498	$25,492.0
Skirts	8,751	1,266.4	5,260	462.0
Pants, incl. jeans	23,662	2,644.0	20,280	1,530.6
Jackets, nontailored, excl. ski	293	106.3	376	66.8
Other sports outerwear (ski & snowsuits, etc.)	na	192.2	1,779	95.9
Vests, excl. sweater vests	204	24.4	na	na
Sweaters	5,891	480.3	na	na
Swimwear	3,139	411.5	na	na
Dungarees, shorts, bermudas, etc.	3,382	195.1	na	142.7
Playsuits, beach tops, halters, etc., excl. bottoms	595	36.3	494	26.9
Athletic uniforms	388	23.2	na	na

na not available

Source: U.S. Bureau of the Census
1982 Census of Manufactures

The ILGWU has compiled data on the long-term trend in the value of shipments by all U.S. producers, benchmarked to the Census of Manufactures. (Includes smaller manufacturers not covered in the Current Industrial Reports data on page 17.)

Value of Shipments By All U.S. Producers: Selected Years, 1972-1984

(Millions of dollars)

	1984	1983	1980	1979	1977	1974	1972
Women's, misses' juniors' sportswear/casual wear, total	$10,504	$11,003	$8,459	$7,364	$5,626	$4,058	$3,052
Jackets	991	1,146	727	504	328	296	168
Blouses, shirts	2,697	3,071	2,468	2,251	1,574	1,104	801
Knit sport shirts	830	858	710	676	608	383	304
Sweaters	698	612	480	466	507	393	336
Skirts	1,460	1,520	1,021	815	503	318	308
Pants	1,751	1,793	1,705	1,545	1,232	915	608
Jeans, dungarees	1,347	1,342	878	684	515	368	245
Playgarments	258	221	163	139	166	129	117
Swimwear	472	440	307	284	193	152	165

Source: Research Department, International Ladies' Garment Workers Union
Conditions in the Women's Garment Industry (Dec. 4, 1985)

PRODUCT SHIPMENTS

As noted in the previous sections on production and shipments, in recent years the industry has consolidated operations in order to meet competition from imports and in the face of declining markets abroad and in the U.S. in some classifications. (A weaker dollar, making U.S. product changes in many foreign markets, may help exports this year).

The latest figures on the share of specific product shipments accounted for by the largest companies are for the year 1982, compiled in the complete census of manufactures, and data for later years, if available, would probably show a greater degree of concentration among the larger companies. Because of the fast-changing fashions in tops, smaller manufacturers of blouses, shirts, etc., hold a bigger share of U.S. industry shipments than noted in other apparel categories.

Share of Specified Women's, Misses' & Juniors' Sportswear/Casual Wear Shipments By the Largest U.S. Manufacturers, 1982

	Product Shipments (Mil. $)	% of value accounted for by largest companies			
		Top 4	Top 8	Top 20	Top 50
Knit sport shirts*					
1982	$ 678.1	19%	32%	51%	72%
1977	499.1	19	29	48	76
Blouses, shirts					
1982	2,533.9	12	18	31	51
1977	1,421.7	14	21	35	56
Pants, incl. jeans					
1982	2,591.2	26	37	53	71
1977	1,460.1	21	29	45	69
Skirts, jackets					
1982	2,351.2	23	32	48	65
1977	738.3	21	29	43	64
Swim suits					
1982	387.1	33	52	84	99
1977	163.8	42	58	85	99

* Made in cut-and-sew shops using knitted fabrics. (Other knit shirts are made in knitting mills, and comparable data is not available.)

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Concentration Ratios in Manufacturing (MC82-S-7)

Leading Manufacturers

The trade publication, SportStyle, compiles an annual list of the top companies in the activewear industry. Following are the top five manufacturers in specified activewear categories with sales figures for the year 1985. Sources are market estimates or statements by corporate officers. All figures include sales of men's and children's as well as women's products.

Leading Manufacturers (continued)

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)

Tennis Apparel	1985 Sales
Jantzen	$ 30
Jockey	25
Catalina	18.5
Head sportswear	15
Fila	14.2

Golf Apparel	1985 Sales
Munsingwear	$ 31.9
La Monde du Golf	12.5
Jockey	10
Tall	8.5
Ultrasport	8.5

Active Sportswear	1985 Sales
Izod-Lacoste	$ 300
Jantzen	80
Catalina	60
Merona	55
Spalding	53

Athletic Footwear Apparel	1985 Sales
Nike	$ 172
Adidas	130
Puma	50
Pony	18
Converse	10.6

Warmups	1985 Sales
Tultex	$ 259.9
Bassett Walker	248
Pannill	191.5
Russell Knit Apparel	190
Stone Manufacturing	50

Running/Cycling/Triathalon Apparel	1985 Sales
Hind	$ 9.1
Dolfin	9.0
Sub 4	7.9
Bill Rodgers & Co.	7.4
Moss Brown & Co.	5.5

Rugged Outerwear	1985 Sales
Woolrich	$ 125
Pacific Trail	77
Patagonia	28
Jansport	20
The North Face	14

Hunting Apparel	1985 Sales
Walls	$ 18
Buddy Schoelkopf	16
Saf-T-Bak	10
Columbia Sportswear	9
Utica DuxBak	5.8

Ski Apparel	1985 Sales
CB Sports	$ 26.3
SportObermeyer	26
Roffe	21.5
White Stag	19
Head Sportswear	16

Beachwear	1985 Sales
Ocean Pacific	$ 237
Hobie Sportswear	45
Gotcha	30
Laguna	20
Catchit	13

Competitive Swimwear	1985 Sales
Speedo	$ 42
Arena	13.8
The Finals	6.5
Hind	3
Dolfin	1

Junior Sportswear	1985 Sales
Sassafras	$ 30.5
Ocean Pacific Jrs.	20
Catalina Jrs.	13.5
Daffy	8
Cole Jrs.	6

(continued)

PRODUCT SHIPMENTS

Leading Manufacturers (continued)

Leading U.S. Manufacturers of Specified Activewear, 1985
(including both men's and women's wear)
(Millions of dollars)
(continued)

Team Apparel	1985 Sales
Russell Athletic	$ 127
Champion	118
DeLong	30.9
Bike	30.5
Mac Gregor - Sand knit	24

Bodywear	1984 Sales*
Danskin	$ 75
Capezio	50
Flexatard	20
Carushka	12
Tickets	9

* 1985 figures not available.

Source: SportStyle (Fairchild Publications), June 17, 1985; July 14, 1986

Leading States

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982
(Millions of dollars)

Women's, misses' & juniors'	1982	1977	% Change 1982/1977
Knit sport shirts, cut-and-sewn, U.S. total	$ 678.1	$ 502.1	+ 35.1%
Leading states:			
New York	221.0	139.1	+ 58.9
California	106.9	130.8	- 18.3
Florida	52.3	16.8	+211.3
Pennsylvania	41.8	60.1	- 30.4
New Jersey	41.4	31.4	+ 31.8
Blouses & shirts, U.S. total	2,533.9	1,403.5	+ 80.5
Leading states:			
New York	812.4	557.4	+ 45.7
California	725.4	259.1	+180.0
Pennsylvania	187.3	151.8	+ 23.4
North Carolina	140.9	58.8	+139.6
New Jersey	118.5	62.7	+ 89.0
Contract work on blouses & shirts, U.S. total	713.4	487.7	+ 46.3
Leading states:			
Pennsylvania	177.0	124.7	+ 41.9
California	86.5	50.2	+ 72.3
New York	64.2	61.7	+ 4.1
South Carolina	60.2	30.7	+ 96.1
North Carolina	43.4	23.7	+ 83.1

(continued)

PRODUCT SHIPMENTS

Leading States (continued)

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982

(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Women's, misses & juniors'			
Swimsuits, U.S. total	387.1	165.4	+134.0
Leading states:			
California	188.7	72.3	+161.0
New York	97.5	56.2	+ 73.5
Pants, U.S. total	2,591.2	1,465.4	+ 76.8
Leading states:			
New York	810.3	444.8	+ 82.2
California	346.4	237.8	+ 45.7
Texas	207.7	77.3	+168.7
Georgia	190.0	79.4	+139.3
North Carolina	129.0	100.7	+ 28.1
Outerwear, n.e.c., U.S. total	643.7	458.1	+ 40.5
Leading states:			
New York	180.9	145.9	+ 24.0
California	126.9	68.5	+ 85.3
New Jersey	32.5	22.3	+ 45.7
Texas	27.2	20.9	+ 30.1
Florida	25.1	12.5	+100.8
Contract work on outerwear, n.e.c., U.S. total	$ 780.9	$ 501.1	+ 55.8%
Leading states:			
New York	115.5	87.8	+ 31.5
Pennsylvania	93.3	55.9	+ 66.9
California	73.5	73.9	- 0.5
Texas	63.2	30.9	+104.5
Tennessee	59.5	29.6	+101.0
Made in Knitting Mills:			
Sweaters, knit jackets & jerseys, U.S. total	817.6	555.5	+ 47.1
Leading states:			
New York	255.2	220.6	+ 15.6
Pennsylvania	241.4	110.4	+118.7
North Carolina	86.5	32.3	+167.8
New Jersey	56.4	34.5	+ 63.5
Knit outerwear sport shirts, U.S. total	1,008.2	518.1	+ 94.5
Leading states:			
North Carolina	326.2	95.5	+241.5
Pennsylvania	103.3	93.1	+ 11.0
New York	55.0	49.1	+ 12.0

(continued)

PRODUCT SHIPMENTS

Leading States (continued)

Value of Shipments By All Producers of Specified Women's Sportswear/Casual Wear in Leading States, 1977, 1982
(Millions of dollars)
(continued)

	1982	1977	% Change 1982/1977
Other knit outerwear products, U.S. total	$ 856.6	$ 689.7	+ 24.2%
Leading states:			
Pennsylvania	262.8	na	--
North Carolina	182.8	81.6	+124.0
New York	71.3	132.2	- 46.1
Wisconsin	43.4	39.7	+ 9.3

n.e.c. not elsewhere classified

Source: U.S. Bureau of the Census
1982 Census of Manufactures
Industry Series MC82-1-22B; MC82-1-23B

PRODUCER PRICE INDEXES

The producer (factory) price for all women's apparel rose an average 1.6% between March 1985 and 1986 while the index for all commodities fell 2.7%. The largest increase in women's sportswear categories was in blouses and shirts which increased 9.5% over the period, while average producer prices for skirts recorded a decline of 4.7%.

Producer (Factory) Price Indexes for Selected Types of Women's Sportswear & Separates, December 1984, 1985, March 1985, 1986

	March			December		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/84
All commodities*	300.3	308.7	- 2.7%	310.2	309.8	- 0.1%
All apparel*	205.8	203.2	+ 1.2	205.1	201.8	+ 1.6
Women's apparel*	183.8	180.9	+ 1.6	183.3	179.6	+ 2.1
Skirts, including uniform (12/77=100)	120.3	126.2	- 4.7	129.6	126.2	+ 2.7
Slacks, jeans & dungarees (12/84=100)	100.0	99.3	+ 0.7	95.9	100.0	- 4.1
Blouses & shirts, except knit sport & sweat shirts (12/77=100)	166.4	151.9	+ 9.5	166.4	152.7	+ 9.0
Sweaters, jackets & jerseys (12/84=100)	96.1	96.0	+ 0.1	100.3	100.0	+ 0.3
Knit outerwear sport shirts, incl. sweatshirts (12/77=100)	151.2	na	--	151.2	na	--

*1967 = 100
na not available

Source: U.S. Department of Labor
Bureau of Labor Statistics

FOREIGN TRADE

Sportswear/casual wear, consist of many items, with designs that can be quickly copied or adapted for mass production in a variety of fabrics. They are prime targets for low-cost apparel producers abroad who want to get into the U.S. market either directly or by working with U.S. manufacturers and large retailers, particularly the mass merchandisers and big discount operations.

According to an analysis of total U.S. market supply of key sportswear/casual classifications, compiled by the U.S. Bureau of the Census, in 1984 imports (in terms of volume) represented 70% of total U.S. consumption of women's and children's sweaters, up from 64.4% in 1983. Of blouse and shirt consumption, imports accounted for 39% in 1984 compared with 33% a year earlier. The share held by imports in 1984 of total consumption of women's and children's slacks and shorts was 30% compared with 25.4% in 1983.

U.S. fabric producers and apparel manufacturers without their own large commitment to overseas production of finished apparel items, unsuccessfully waged a strong fight to get Congress to override President Reagan's veto of the Textile and Apparel Trade Enforcement Act in August 1986. However, the U.S. has participated in the five-year renewal of the Multi-Fiber Arrangements (M-FA). This has extended coverage, for the first time, to include apparel and fabrics made from vegetable fibers and blends of other fibers, as well as blends containing silk, and may affect exporters of sweaters made with ramie, shipments of which have mushroomed in recent years. In total, it is reported that 120 million sweaters made of vegetable fibers came into the U.S last year, and overall imports of apparel made with vegetable fibers accounted for 10% of American imports of apparel, up from 2% in 1984.

The M-FA sets the ground rules under which bilateral agreements can be negotiated. Some agreements have already been worked out with Hong Kong, Taiwan and South Korea, and U.S. interests can be expected to press for more controls, and possibly again try to get import quota legislation before the end of 1986. Meanwhile, it is hoped that a weaker U.S. dollar, which reduces the cost of American-made goods in the countries with an improved rate of exchange, will strengthen U.S. exports of apparel.

Imports

The sharp increase in imports of reported types of sportswear/separates is noted in the table below. Data include both women's and children's wear except where otherwise noted. (Figures cover apparel imported for use in the U.S. not items held for transhipment to other ports.)

FOREIGN TRADE

Imports

Imports of Selected Women's & Children's Wear, 1980-1984
(Thousands of units)

	1984	1983	1982	1981	1980
Blouses, total*	313,203	276,913	243,142	228,064	210,960
Cotton	164,373	140,055	125,985	118,007	107,475
Wool	10,060	7,166	5,186	7,968	6,603
Manmade	128,085	123,598	107,699	96,686	93,214
Silk (non-ornamented)	10,684	6,094	4,272	5,402	3,668
Knit shirts, not including knit tops, total	229,523	228,321	191,253	174,290	168,209
Sweaters (men's, women's, children's), total*	242,638	187,622	161,556	149,035	149,955
Cotton	15,189	10,000	8,900	5,651	6,115
Wool	42,063	34,392	31,055	27,519	30,659
Manmade	136,211	128,981	115,244	112,608	112,460
Skirts, total	45,392	36,443	23,334	21,559	14,774
Cotton	25,501	19,530	14,740	14,327	9,955
Wool	4,206	2,933	1,556	1,287	1,298
Manmade	15,685	13,980	7,038	5,944	3,522
Slacks & shorts, total*	149,269	140,596	99,845	106,626	97,843
Cotton	34,631	24,100	23,157	21,230	18,114
Manmade	112,308	97,166	107,224	75,482	68,585
Playsuits, total*	48,776	33,593	30,283	29,141	26,496
Cotton	34,631	24,100	23,157	21,230	18,114

* Includes garments of fibers not shown separately.

Source: ILGWU based on U.S. Bureau of the Census reports

The top five suppliers of imports of sportswear/casual wear in 1985 included Taiwan, Hong Kong, South Korea, China and the Philippines.

Imports (continued)

Summary of U.S. Imports of Women's & Children's Sportswear & Separates, 1984, 1985

	Quantity (Thous. Doz.)		% change	Value C.I.F.* (Thous. Doz.)		% change
	1985	1984	1985/84	1985	1984	1985/84
Total, all reported categories	na	na	—	$4,826,723	$4,226,311	+ 14.2%
Blouses & shirts, total	39,639.8	37,391.3	+ 6.0%	1,978,402	1,777,464	+ 11.3
Blouses	22,173.7	17,928.8	+ 23.7	1,391,616	1,119,012	+ 24.4
Not knit	21,508.3	17,111.9	+ 25.7	1,321,505	1,036,488	+ 27.5
Cotton	11,312.8	9,597.5	+ 17.9	633,604	501,743	+ 26.3
Wool or manmade	9,387.3	6,769.9	+ 38.7	547,555	412,904	+ 32.6
Silk	808.2	744.5	+ 8.6	140,346	121,841	+ 15.2
Knit, wool	665.4	816.9	- 18.5	70,111	82,524	- 15.0
Shirts, knit						
Cotton or manmade	17,446.1	19,462.5	- 10.4	586,786	658,452	- 10.9
Sweaters, knit	13,221.2	11,372.4	+ 16.3	1,138,236	944,590	+ 20.5
Cashmere, wholly or part	61.0	70.9	- 14.0	29,106	29,758	- 2.2
Sheep-like hair	283.9	239.9	+ 18.3	40,502	37,015	+ 9.4
Wool	1,740.4	1,599.7	+ 8.8	267,508	222,137	+ 20.4
Manmade	9,842.5	8,571.7	+ 14.8	657,672	557,057	+ 18.1
Cotton	1,293.4	890.2	+ 45.3	143,448	98,623	+ 45.5
Pants, slacks & shorts	20,727.8	19,226.7	+ 7.8	1,265,557	1,139,779	+ 11.0
Not knit						
Cotton	12,597.3	12,263.2	+ 2.7	832,183	773,050	+ 7.6
Wool	373.4	241.2	+ 54.8	65,346	46,920	+ 39.3
Manmade	7,642.0	6,621.4	+ 15.4	346,394	302,091	+ 14.7
Silk	115.1	100.9	+ 14.1	21,634	17,718	+ 22.1
Skirts	4,177.4	3,784.0	+ 10.4	364,657	301,333	+ 21.0
Not knit	3,620.8	3,392.9	+ 6.7	318,702	267,902	+ 19.0
Wool	344.4	275.9	+ 24.8	66,393	52,209	+ 27.1
Manmade	1,192.4	1,105.3	+ 7.9	94,545	78,535	+ 20.4
Cotton	2,084.0	2,011.7	+ 3.6	157,764	137,158	+ 15.0
Knit	556.6	391.1	+ 42.3	45,955	33,431	+ 37.5
Wool	83.2	77.4	+ 7.5	17,195	13,916	+ 24.5
Cotton or manmade	473.4	313.7	+ 50.9	28,760	19,615	+ 46.6
Playsuits, not knit, cotton	2,486.1	1,985.7	+ 25.3	79,871	63,145	+ 26.2

na not applicable

* The C.I.F. value is based upon the purchase price and includes all freight, insurance and other charges (excluding U.S. import duties) incurred in bringing the merchandise from the country of exportation and generally placing it alongside the carrier at the first port of entry in the U.S.

Source: U.S. Bureau of the Census
U.S. General Imports, FT 135
December 1984, 1985

AT THE RETAIL LEVEL

THE POTENTIAL MARKET

The market potential for women's sportswear has expanded not only due to the growth in population (particularly of young adults) but also to the rapid rise in the number of women in the labor force. This group requires more apparel than nonworking women and is the most open to new fashion approaches in color and style. As of April 1986, 51,172,000 women were in the labor force -- 55.1% of the noninstitutionalized female population (16 years and older). Of these 48,333,000 were employed. This compares with an average of 31,527,000 women employed in 1972.

Dress standards in the work place have become much more relaxed in recent years, and this has been a direct benefit to the sportswear/casual wear industry. Women rely on separates for variety and to update their workday and leisure wardrobes. The activewear category has been aided by the demographic characteristics of the population, with numbers concentrated in young adults interested in physical fitness and in sports participation.

Estimated Female Population of the U.S. 1985 & Projections 1995*, 2005*
(Numbers in thousands, including Armed Forces overseas)

				% Change	Percent Distribution		
	1985	1995	2005	2005/1985	1985	1995	2005
Total all ages	122,634	133,191	141,381	+ 15.3%	100.0%	100.0%	100.0%
Under 15 years	25,359	27,699	26,446	+ 4.3	20.6	20.8	18.7
15 years & older	97,274	105,493	114,935	+ 18.1	79.3	79.2	81.3
15 - 19 years	9,110	8,300	9,624	+ 5.6	7.4	6.2	6.8
20 - 24 years	10,503	8,420	9,382	- 10.7	8.6	6.3	6.0
25 - 34 years	21,059	20,077	17,324	- 17.7	17.2	15.1	12.2
35 - 44 years	16,136	21,119	20,341	+ 26.1	13.2	15.9	14.4
45 - 54 years	11,629	16,071	20,908	+ 79.8	9.5	12.1	14.8
55 - 64 years	11,834	11,059	15,399	+ 30.1	9.6	8.3	10.9
65 years & older	17,002	20,447	21,957	+ 29.1	13.8	15.4	15.5
Median age	32.7	35.9	39.2				

Source: U.S. Bureau of the Census
Current Population Reports,
P-25, No. 952 (May 1984), No. 985 (April 1986)

Activewear manufacturers are broadening their lines to cover fashion-active and street-active. They are also extending size classifications, particularly to include large sizes which previously had been ignored. Some retailers are reporting increases of 20% to 35% with this category. In a recent survey conducted by The Gallup Organization among large-sized women, sportswear was the most frequently cited category in which this group had trouble finding suitable styles and colors. The most common complaint about large sized sportswear among large sized women was a lack of styles as well as an insufficient variety of sizes.

RETAIL SALES

The large number of different items included in the broad category, women's sportswear/casual wear, and the great variety of retail outlets selling this merchandise -- from street vendors to specialty stores -- makes for difficulty in arriving at a total retail sales estimate. However, based on published information covering total market supply, the total value of retail sales is estimated at approximately $30 billion.

RETAIL SALES BY OUTLET TYPE

The U.S. Department of Commerce, Bureau of the Census, compiles a census of retail trade every five years, covering retail outlets with one or more employees. The most recent census covered operations in 1982, and reports on merchandise line sales by type of outlet were published by the Bureau in 1985.

Included in the reports are separate breakdowns on women's sportswear/casual wear for major outlet types, with the reported total amounting to about $20 billion for these outlets. Not included are sales in variety stores and other miscellaneous types of general merchandise stores, mail order sales (except catalog order desks in department stores), sales in menswear stores, supermarkets, by street vendors, etc., as well as sales by mama-papa operations without paid employees.

Following is a breakdown covering reported sales by outlet type in 1982. Women's wear stores accounted for 43% of the reported total sales of sportswear/casual wear; department stores, about 39%. Included in the $19.7 billion total in sales in covered retail outlets and tops, bottoms and activewear, as described below. Not included are jackets, blazers and other non-specified types of casual wear.

Sales of Specified Types of Women's Sportswear/Casual Wear By Reporting Outlets, 1982

(Covers retail outlets with payroll. Sales in millions of dollars)

	Total Reported		Tops*		Bottoms**		Activewear	
	Sales	Percent	Sales	Percent	Sales	Percent	Sales	Percent
Sportswear/casual wear Reported sales:	$19,707.4	100.0	$9,198.7	100.0	$7,493,8	100.0	$3,014.9	100.0
Outlet types reported:								
Department stores#	7,633.5	38.7	3,510.7	38.2	2,911.2	38.8	1,211.6	40.2
Women's wear stores##	8,479.1	43.0	4,130.4	44.9	3,297.0	44.0	1,051.7	34.9
Family clothing stores	3,037.1	15.4	1,483.1	16.1	1,209.6	16.1	344.4	11.4
Sporting goods stores	393.5***	2.0	—	—	—	—	393.5***	13.1
Other reported types of retail outlets	164.2	0.9	74.5	0.8	76.0	1.0	13.7	0.4

# Department stores include discount department stores, the department store outlets of national chains such as Sears, Ward, Penney as well as traditional department stores. Leased sales are not included, but are counted in the Census as separate specialty store operations.

Includes women's ready-to-wear stores and other specialized women's apparel/accessories stores.

* Includes both knit and woven shirts, blouses, sweaters.

** Includes pants, jeans, walking shorts, skirts.

*** Activewear (tennis, golf, jogging, swimming, etc.) in sporting goods stores includes girls' as well as women's.

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY OUTLET TYPE

Department Stores

Department stores accounted for 38.6% of the total sales of reported types of women's sportswear in retail outlets in 1982 according to the census of retail trade. Better than six out of every ten of the department stores reported sales of women's activewear, with sales in this category totaling $1.2 billion.

Women's Sportswear Sales in Department Stores: 1982

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Department stores, total	9,981	100.0	$99,170,163	—	100.0%
Sportswear/casual wear reported	na	na	7,633,474	na	7.7
Slacks, jeans, pants & skirts	6,073	60.8	2,911,185	3.8	2.9
Tops, incl. skirts, blouses & sweaters	6,105	61.2	3,510,668	4.6	3.5
Active sportswear	6,175	61.9	1,211,621	1.6	1.2

na not available

Note: Leased departments are not included in the above. Catalog mail order desk sales are included. Each store location is separately counted in the above table. Department stores include both traditional department stores and discount department stores which meet the definition of this store type under the Standard Industrial Classification (SIC) system. Department stores operated by mail order chains and mass merchandisers are also included in the above table.

Source: U.S. Bureau of the Census
1982, Census of Retail Trade (RC82-1-3)

Note: For details on department store operations, as reported in the 1982 Census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

The National Retail Merchants Association reported that adult female sportswear contributed a typical or median 14.8% of sales of their reporting department stores. Sales in 1984 averaged a gain of 10.8% with only women's & misses' active sportswear registering a larger gain (+13.9%).

RETAIL SALES BY STORE TYPE

Department Stores (continued)

Selected Typical (Median) 1984 Merchandising & Operating Results In Department Stores With Total Annual Sales Over $1 Million

	Total Upstairs Store (107)*	All Adult Female Apparel (103)*	All Adult Female Sportswear (105)*	Junior Spectator Sportswear (55)*	Junior Active Sportswear (31)*
Net sales % change from last year	+ 8.5%	+ 9.4%	+ 10.8%	+ 9.5%	+ 12.2%
Sales % to total store	93.9	28.7	14.8	3.1	0.6
Net sales % of merchandising division	—	100.0	55.7	12.1	2.4
$ sales per sq. foot of selling space	$127.0	$154.2	$164.6	$149.4	$183.4
Cumulative markon, %	49.0%	51.8%	51.9%	52.3%	52.5%
Gross margin, % of sales including cash discounts	41.2	42.1	42.6	44.2	44.0
Markdowns, retail, % of sales	18.8	28.2	27.5	26.3	27.7
Returns, % of sales	10.2	13.7	12.3	10.6	7.8
Number of stock turns	2.7	3.6	3.8	4.1	4.0
Salespeople's salaries, % of sales	7.6	6.5	6.5	4.3	5.0
Sales promotions % of sales	3.1	3.0	2.8	5.0	4.4

	Women's & Misses' Spectator Sportswear (64)*	Women's & Misses' Active Sportswear (39)*	All Adult Female Jackets & All-Weather Coats (47)*
Net sales % change from last year	10.7%	13.9%	+ 4.9%
Sales % to total store	11.4	1.1	0.9
Net sales % of merchandising division	45.8	4.4	3.6
$ sales per sq. foot of selling space	$146.4	$220.3	$165.6
Cumulative markon, %	52.4%	52.0%	51.0%
Gross margin, % of sales including cash discounts	41.9	44.7	44.1
Markdowns, retail, % of sales	29.5	25.9	22.4
Returns, % of sales	15.6	9.3	14.7
Number of stock turns	3.7	3.7	3.6
Salespeople's salaries, % of sales	5.3	7.0	6.1
Sales promotions % of sales	3.9	3.9	4.1

*Number in parentheses refers to the number of firms reporting in each category.

Source: National Retail Merchants Association
"Merchandising & Operating Results"
(1985 Edition)

RETAIL SALES BY STORE TYPE

Department Stores (continued)

In May 1986 a mail survey was conducted by the Fairchild Market Research Department for Women's Wear Daily among key department stores (as well as the important women's specialty stores) to develop information form merchandise managers on the merchandising of women's activewear.

All of the department stores represented in the survey carry fashion (or street) activewear, 73.4% of the respondents also carry authentic (functional) activewear. Where both types are sold, the typical department store does 80% of its business in fashion active, 20% in authentic active.

Warmups are the activewear item most frequently carried (and registering the fastest growth) by department stores, some of which classify them as fashion active. With the growing importance of updated fashion fleecewear, a growing number of department stores will follow this pattern. Dancewear/aerobic wear were the second most important items mentioned by department stores.

Most department store respondents (47%) reported that authentic activewear, when carried, is sold in the regular women's sportswear departments, both main store and branch store. About 28% said this merchandise is sold in separate functional active departments for adult females, while 17% sell it in a department that includes men's activewear. Just 8.5% reported that women's authentic activewear is sold in a separate sporting goods department.

Another survey, conducted by the Fairchild Market Research Deparment in August 1985, developed information on the merchandising of women's swimwear in department stores. Among the findings: maillots were the best-selling styles among reporting stores, accounting for a median 53% of swimwear sales in department stores, followed by sheaths (22%), bikinis (21%), swimdresses (12.2%).

Specialty Stores

According to the 1983 census of retail trade, sales of covered items of women's sportswear/casual wear in women's ready-to-wear stores with payroll amounted to $8.3 billion, representing almost 41% of total store sales. In family clothing stores, sales of covered items amounted to $3.0 billion, representing almost 23% of total store sales.

Women's Sportswear Sales in Specialty Stores, 1982

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Women's ready-to wear stores, total	44,163	100.0%	$20,248,922	—	100.0%
Sportswear/casual wear, total	na	na	8,282,375	na	40.9
Slacks, jeans, pants & skirts	37,649	85.3	3,283,800	18.9	16.2
Tops, incl. shirts, blouses & sweaters	37,668	85.3	4,111,671	23.2	20.3
Active sportswear	21,334	48.3	886,904	7.7	4.4

(continued)

Specialty Stores (continued)

Women's Sportswear Sales in Specialty Stores, 1982
(continued)

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
Family clothing stores, total	17,859	100.0%	$13,451,003	—	100.0%
Sportswear/casual wear, total	na	na	3,037,144	na	22.6
Slacks, jeans, pants & skirts	14,760	82.6	1,209,644	11.3	9.0
Tops, incl. shirts, blouses & sweaters	15,353	86.0	1,483,063	12.4	11.0
Active sportswear	9,829	55.0	344,437	4.2	2.6

na not available

Note: Each store location is separately counted, regardless of whether or not it is part of a multi-unit operation.

For details on operations in these store types, as reported in the 1982 census, see the Fairchild Fact File: A STATISTICAL ANALYSIS OF RETAILING (1985).

Source: U.S. Bureau of the Census
1982 Census of Retail Trade (RC 82-1-3)

The National Retail Merchants Association reported that sales of women's and misses' sportswear registered median increases of 11.3% in women's wear stores in 1984, while junior sportswear averaged a gain of 1.7%.

Selected Typical (Median) 1984 Merchandising & Operating Results In Specialty Stores With Total Annual Sales Over $1 Million

	All Adult Female Apparel (28)*	Women's & Misses' Sportswear (26*)	Women's & Misses' Spectator Sportswear (09)*	Juniors' Sportswear (18*)
Net sales, % change from last year	+ 7.3%	+ 11.3%	nr	+ 1.7%
Sales, % of merchandise division	100.0	50.3	47.6	16.9
Sales, % to total store sales	48.9	22.5	13.6	7.0
$ sales per sq. foot of selling space	$144.0	$162.6	nr	$144.7
Cumulative markon, %	51.9%	52.3%	nr	51.8%
Gross margin, % of sales including cash discounts	42.9	43.1	nr	43.9
Markdowns, retail, % of sales	26.6	24.7	24.8	27.2
Returns, % of sales	10.0	10.3	nr	nr
Sales promotions, % of sales	2.5	2.2	nr	nr
Salespeoples salaries, % of sales	8.0	7.4	nr	nr
Number of stock turns	3.3	3.6	3.7	3.6

nr not reported
* Number in parenthesis refers to the number of firms responding in each area.

Source: National Retail Merchants Association
"Merchandising & Operating Results" (1985 Edition)

RETAIL SALES BY STORE TYPE

Sporting Goods Stores

Sporting Goods Store Sales By Merchandise Line, 1982
(Includes establishments with payroll, including leased departments)

	Stores		Sales of specified merchandise line		
				Percent of total sales of	
	Number	Percent	Amount (thous. $)	Stores selling the line	All Stores
General line sporting goods stores sales, total	9,252	100.0%	$4,377,471	—	100.0%
Women's & girls' activewear	6,236	67.4	282,514	9.2	6.5
Specialty line sporting goods stores, total	10,900	100.0	3,137,440	—	100.0
Women's & girls' activewear	2,177	22.0	110,938	15.0	3.5

Source: U.S. Bureau of the Census
1982 Census of Retail Trade RC82-1-3

RETAIL SALES BY PRODUCT

Activewear and sweaters were the two bright areas in the sportswear markets, both marking double digit gains in unit purchases in 1985 according to an analysis by Kurt Salmon Associates. Overall, however, retail sales for women's sportswear remained weak in 1985. For 1986, the same pattern of generally flat sales was expected, with the exception of sweaters and activewear. Trade sources cite the lack of newness in the category for the lack of sales growth in recent seasons.

Percent Change in Women's Sportswear Consumption, 1983 - 1986
(% change in units purchased by Consumers)

	Forecast 1986/1985	Estimated 1985/1984	1984/1983	1983/1982
Women's wear, total	+ 3%	--	+ 1%	--
Blouses & shirts	- 2	- 5%	- 2	- 2
Sweaters	+ 10	+ 20	+ 11	+ 6
Slacks	+ 3	+ 3	- 1	+ 9
Denim Jeans	+ 2	+ 1	- 7	--
Skirts	+ 2	- 11	+ 2	+ 4
Activewear	+ 8	+ 15	+ 16	+ 32

Source: Kurt Salmon Associates
Softgoods Outlook, 1986
Based on the KSA/NPD purchase panel of 18,000 households.

RETAIL SALES BY PRODUCT

Sweaters

According to an analysis of consumer purchases, issued April 1986 by the Soft Goods Information Service Group of MRCA Information Services, Stamford, Conn., sweaters have been one of the brighter areas within the women's sportswear industry. Between 1980 and 1985, women's sweater purchases jumped from 189 million to 329 million yearly -- or from just over two sweaters per woman, to well over three per capita. This market, in dollar terms, grew by over $1 billion in 1985 reaching $5.6 billion in sales that year. The MRCA data are based on purchase diaries maintained by a representative panel of households in the U.S.

Two of the keys which are believed to have spurred sweater sales in recent years are affordability and versatility. According to a study of the market by a major market research company, the average price of sweaters purchased in 1985 was about $20. At this level, sweater purchases can be made without much deliberation. Sweaters are also extremely versatile in that they can be used to create several different outfits which often can bridge the gap between work and leisure.

Retailers are currently taking steps to springboard the growth which has occurred in the sweater category into other areas. In light of the sales ratio of 2-to-1 for bottoms to tops, many retailers are merchandising skirts along with sweaters in order to stimulate sales in that category.

Women's Jeans

The $3.0 billion women's jeans market has been stagnant over the last several years. As 1986 progresses, however, retailers are reporting a resurgence of the basic, five-pocket jean, particularly in black and gray denim. While sales are expected to show a slight improvement in 1986, they are still well below the peak levels recorded in 1983. One of the major reasons credited for the decline of the jeans market is the aging of the baby boomers, the segment which drove jeans sales up in the 1970's. Market estimates are for 172.1 million pairs of women's jeans to be purchased in 1986.

Manufacturers and retailers have responded to this change in the market by altering their merchandise mixes. Without cutting back on their denim groupings, many firms are now offering a wider variety of pastels and prints. Streamlined silhouettes are expected to aid jean sales as are cigarette-leg pants.

With the impending merger of VF Corporation and Blue Bell Holding Co., the structure of the jeans industry is about to undergo a major change. This newly formed company is expected to garner the largest share of the jeans market, dropping Levi Strauss into second position domestically. Levi's, however, will remain the largest jeans company worldwide. Pre-merger, market share is shown in the table below.

U.S. Jeans Market Share By Brand, 1985
(Includes both men's and women's)

	Market Share
Levi Strauss	22%
Lee (VF Corp.)	15
Wrangler (Blue Bell)	10
Imports	20
All other U.S. brands	33

Source: Wall Street Journal
July 31, 1986

RETAIL SALES BY PRODUCT

Activewear

Market estimates on sales of women's activewear, which includes "fashion" active as well as performing or functional activewear, put the category at about $3.3 billion in 1985, 10% above the $3.0 billion reported for 1982 in the Census of Retail Trade, U.S. Census Bureau. According to data from Kurt Salmon Associates, activewear for women has been one of the best performing apparel categories, on a unit sales basis, since 1982. For 1986, this source estimates that women's unit sales will increase by about 8%.

Annual Change in Female Activewear Consumption, 1982 - 1986
(Percent change in units purchased)

	1986/1985(p)	1985/1984(e)	1984/1983	1983/1982
Women's activewear	+ 8%	+ 15%	+ 16%	+ 32%

(p) preliminary (e) estimated

Source: Kurt Salmon Associates
Softgoods Outlook, 1986
Based on the KSA/NPD Purchase Panel of 18,000 households

The rapid growth in the number of women in sports participation has had a major effect on the entire sporting goods industry including sales of activewear. While men still represent the largest number of active participants in most sports, the NSGA reports that a large majority of new participants in many sports are women.

Following is a list of the top ten sports based on participation by women as determined by a survey of adults 18 years and over by the Gallup Organization in late 1985.

Female Participation in Specified Sports, 1985
(Percent participating in the past twelve months)

Sport	Percent
Swimming	40%
Bicycling	33
Aerobics	31
Fishing	24
Bowling	23
Camping	21
Jogging	21
Hiking	18
Softball	16
Volleyball	14

Source: The Gallup Organization

RETAIL SALES BY PRODUCT

Activewear (continued)

Functional activewear sales estimates for 1984-1986, based on interviews with 80,000 households, have been compiled by the National Sporting Goods Association. It should be noted that these estimates do not include institutional (team) purchases.

Estimated Retail Sales of Specified Women's Functional Activewear, 1984-1986
(Millions of dollars)

	Forecast For 1986	Estimated 1985	Estimated 1984	1986/1985
Total	$1,210.0	$1,168.0	$1,137.7	+ 3.6%
Swimwear	569.1	552.8	560.5	+ 2.9
Golf clothing	54.2	52.6	53.1	+ 3.0
Parkas - down/fiber filled	95.0	93.1	93.1	+ 2.0
Shorts - elastic waist	83.6	83.6	83.6	--
Skiwear	141.7	130.6	97.6	+ 8.5
Sweatshirts	160.2	152.6	145.3	+ 5.0
Tennis clothing	58.8	55.7	54.6	+ 5.6
Vests - down/fiber filled	47.4	47.4	49.9	--
Warm-up suits				

Source: Fairchild Market Research Department based on National Sporting Goods Association
The Sporting Goods Market in 1986

RETAIL ADVERTISING

Percent of Year's Total Newspaper Linage Run By Retailers Each Month, 1984

	Junior Sportswear	Sweaters & Knit Tops	Swimsuits & Beachwear	Woven Blouses & Shirts	Pants, Shorts & Jeans
January	3.5%	3.9%	5.3%	4.9%	4.6%
February	6.6	5.6	5.7	9.3	7.2
March	7.0	7.0	4.1	8.8	9.3
April	8.8	8.1	6.2	9.5	10.2
May	9.5	7.8	19.3	9.5	10.0
June	5.6	5.3	30.8	4.5	6.8
July	7.6	5.9	12.9	5.7	7.9
August	17.7	8.9	1.4	8.2	10.5
September	7.7	8.9	0.2	8.2	8.7
October	7.6	10.7	0.0	9.2	9.1
November	10.4	14.2	6.4	11.7	8.1
December	8.0	13.7	7.7	10.5	7.6
Year	100.0	100.0	100.0	100.0	100.0

Source: The Advertising Checking Bureau, Inc.
Newspaper Advertising Bureau
(1986 Newspaper Advertising Planbook)

CONSUMER PRICE TRENDS

Retail prices for women's apparel fell 1.5% in the twelve months ended in May 1986 compared with a 1.6% increase for the overall Consumer Price Index over the same period. Women's separates and sportswear prices increased 4.0% during this period.

Consumer Price Indexes for Selected Women's Apparel Items
1984, 1985 Average, May 1985, 1986
(1967 = 100 unless otherwise specified)

	May			Annual Average		
	1986	1985	% Change 1986/85	1985	1984	% Change 1985/83
All items	326.3	321.3	+ 1.6%	318.5	307.6	+ 3.5%
Apparel (not including footwear)	187.3	187.3	--	187.7	182.5	+ 2.8
Women's apparel (1977=100)	110.6	112.3	- 1.5	114.6	110.3	+ 3.9
Separates & sportswear (1977=100)	106.0	101.9	+ 4.0	104.4	96.2	+ 8.5

Source: U.S. Department of Labor,
Bureau of Labor Statistics

CONSUMER BUYING HABITS

Information on the demographic characteristics of purchasers of activewear is compiled by the National Sporting Goods Association. This data covers both male and female purchasers (combined); however, a majority of items covered in the table below are represented by female purchasers.

Characteristics of Specified Activewear Purchasers, 1985

	Total U.S. Households	Bathing Suits	Body Suits
Total, all purchases	100.0%	100.0%	100.0%
Sex of user:			
Female	51.3	79.6	94.9
Male	48.7	20.4	5.1
Age:			
Under 14	20.3	9.4	10.8
14 - 17	6.2	9.6	5.5
18 - 24	12.4	14.2	13.6
25 - 34	17.4	30.1	40.8
35 - 44	13.0	16.7	19.3
45 - 64	18.9	16.3	9.1
65 & older	11.8	3.7	0.9

(continued)

Characteristics of Specified Activewear Purchasers, 1985
(continued)

	Total U.S. Households	Bathing Suits	Body Suits
Household income:			
Under $15,000	31.9	16.8	17.9
$15,000 - $24,999	20.7	16.9	20.6
$25,000 - $34,999	17.8	19.7	20.3
$35,000 - $44,999	12.1	15.2	12.7
$45,000 & over	17.5	31.4	28.5
Geographic region:			
New England	5.4	5.2	3.7
Middle Atlantic	15.9	18.3	11.1
East North Central	17.5	14.7	18.0
West North Central	7.5	5.7	4.0
South Atlantic	17.0	18.6	19.6
East South Central	6.4	5.2	4.9
West South Central	10.8	11.8	10.2
Mountain	5.4	4.8	7.9
Pacific	14.1	15.7	20.6

Source: National Sporting Goods Association
The Sporting Goods Market in 1986

Average Purchase Rates of Women's Sportswear, 1984
(Monthly purchase rate per 1,000 households)

	Jan.	Feb.	Mar.	Apr.	May	June
Blouses/sweaters	834.9	742.8	935.9	842.6	1005.3	1189.6
Pants/slacks/shorts	227.6	217.9	312.8	337.1	435.7	539.7
Jeans	99.9	86.6	125.7	87.2	98.7	79.8
Skirts/suits/dresses	305.8	355.6	461.0	492.7	511.1	548.0

	July	Aug.	Sept.	Oct.	Nov.	Dec.
Blouses/sweaters	997.9	874.7	955.5	870.0	982.7	1652.0
Pants/slacks/shorts	418.9	298.0	256.3	222.3	214.8	265.1
Jeans	77.6	144.1	111.1	96.3	89.0	146.1
Skirts/suits/dresses	432.2	392.4	367.5	340.6	287.2	412.1

Source: MRCA Information Services, 1984
1986 Newspaper Advertising Planbook
Newspaper Advertising Bureau

CONSUMER BUYING HABITS

Women's Sportswear Purchases By Price Point, 1984

	Skirts	Slacks	Sweaters	Knitted Tops	Woven Blouses	Shorts	Warmups
Under $5	6.5%	6.4%	3.8%	22.8%	10.2%	27.0%	3.2%
$ 5 - $ 9.99	22.2	28.8	24.2	43.2	34.8	42.8	10.5
$10 - $14.99	24.6	25.3	25.1	19.2	25.9	18.0	19.9
$15 - $24.99	28.3	28.9	30.3	12.0	21.1	10.6	39.2
$25 - $34.99	10.3	6.6	10.8	2.2	5.4	1.2	15.7
$35 - $49.99	2.4	1.1	1.8	0.2	0.8	0.1	3.5
$50 & over	5.7	2.4	4.0	0.4	1.8	0.3	8.1

Source: MRCA Information Services, 1984
1986 Newspaper Advertising Planbook
Newspaper Advertising Bureau

SEVENTEEN Magazine's annual Back-To-School study, conducted most recently in September 1984, detailed what teen girls spent on their wardrobe. Completed questionnaires were received from 1,125 teenagers currently attending high school or college. Results were then projected to the entire market.

Teenage Buying Trends for Sportswear & Separates

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Jackets			
Blazers	1,274	1,736	$ 62,293
Ski jackets	1,104	1,234	79,617
Leather/Suede	261	273	27,617
Bomber	647	665	29,748
Parkas	304	388	17,126
Pea coats	202	219	16,471
Blouson	633	664	25,390
Other	959	1,079	47,905
Total buying jackets	4,312	6,368	318,818
Skirts			
Below knee length	2,376	3,503	115,069
Knee length	1,795	2,906	71,036
Mini (above the knee)	1,497	1,928	38,988
Other	96	124	4,243
Total girls buying skirts	4,633	8,461	229,336
Total girls buying shirts/ blouses	5,010	20,550	502,550

(continued)

Teenage Buying Trends for Sportswear & Separates
(continued)

	Number Purchasing Add (000)	Number Purchased Add (000)	Total Expenditures Add (000)
Sweaters			
Pullovers	6,069	16,187	$ 487,983
Turtlenecks	1,508	3,397	43,664
Cardigans (cardigan vest)	1,660	2,378	67,248
Coat sweaters	381	475	17,474
Sweater jackets	634	735	26,161
Pullover vests	4,372	7,685	201,987
Other	225	358	21,213
Total girls buying sweaters	7,421	31,215	865,730
Pants			
Jeans	6,660	14,321	504,970
Long, straight leg	3,261	6,211	185,408
Narrow-leg	4,013	7,448	233,983
Shorts	2,326	6,221	121,613
Cuffed pants	1,752	2,535	76,029
Ski	218	255	15,410
Wide-leg	678	1,160	39,643
Baggies	208	285	8,581
Other	837	1,566	43,429
Total girls buying pants	8,178	40,002	1,229,066

Women's Swimwear

Information on the purchase patterns for women's swimsuits is available from a survey of 1,500 women conducted by The Gallup Organization. According to this study, nearly two out of three women report buying their swimsuits on sale, and are most apt to buy swimsuits in early summer.

Price Expected to Pay for Next Swimsuit Purchase

	Age of Purchaser						Income of Purchaser (thous.)			
Price Paid	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20 $30	$30- $40	$40+
Less than $20	24%	36%	25%	20%	21%	8%	33%	24%	18%	9%
$20 - $29.99	38	38	46	40	31	32	37	43	48	38
$30 - $39.99	22	15	19	23	23	31	13	25	22	29
$40 or more	12	11	8	13	17	11	9	8	10	23
Don't know/ No answer	5	--	3	6	6	19	8	2	5	1

CONSUMER BUYING HABITS

Women's Swimwear (continued)

Stores Shopped for Last Swimsuit

	Age of Purchaser						Income of Purchaser (thous.)			
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$20-$30	$30-$40	40+
Department stores	64%	55%	77%	59%	61%	57%	56%	56%	71%	82%
Mass merchandisers (Sears, Penney, Ward)	14	13	10	16	16	12	16	16	9	3
Specialty stores	11	18	11	6	13	12	10	12	11	11
Discount stores	10	7	8	17	8	4	13	13	16	3
All other stores	12	20	9	10	9	8	10	20	13	9
Don't know/no answer	2	2	—	1	—	12	4	—	2	—

Note: Columns add to more than 100.0% due to multiple responses.

Number of Swimsuits Purchased In Year

	Age of Purchaser						Region			
	Total	18-24	25-34	35-49	50-64	65+	East	Midwest	South	West
One	58%	54%	67%	59%	52%	52%	62%	52%	65%	51%
Two	12	30	10	8	5	4	13	8	12	14
Three or more	5	7	5	4	—	—	4	2	7	3
None	22	8	17	22	39	33	18	34	11	26
Don't know/no answer	4	2	1	7	4	12	3	4	4	7

Source: The Gallup Organization
Apparel Merchandising, September 1985

Jeans

Results from another survey conducted by The Gallup Organization covering purchases of jeans indicated that slightly more than half of all purchasers expect to pay less than $25. Overall, Gallup estimates that 172.1 million pairs of jeans will be sold in 1986 with the most common purchaser being between 18 and 34 years old.

Expected Price of Next Women's Jean Purchase

	Age of Purchaser						Income of Purchaser (thous. $)		
Price Expected to Pay	Total	18-24	25-34	35-49	50-64	65+	Under $20	$15-$30	$30+
Less than $20	28%	29%	27%	14%	34%	46%	35%	31%	20%
$20 - $29.99	29	29	29	36	20	9	29	31	29
$30 - $39.99	16	16	19	13	11	18	16	16	14
$40 or more	20	23	24	15	15	27	11	17	30
Don't know/ No answer	7	3	1	12	20	--	9	5	7

Jeans (continued)

Stores Expected to be Shopped For Next Jeans Purchase

	Age of Purchaser						Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $20	$15-$30	$30+
Department stores	44%	44%	47%	43%	37%	36%	44%	45%	49%
Discount stores	20	25	19	21	14	9	24	17	13
Specialty stores	15	24	16	11	11	9	10	13	21
Mass merchandisers (Sears, Penney, Ward)	12	3	12	8	27	45	9	13	10
All other	8	4	10	13	5	—	8	8	7
Don't know/no answer	6	—	2	8	18	—	8	5	4

Number of Jeans Expected to be Purchased in the Next Year

		Age Groups				
	Total	18-24	25-34	35-49	50-64	65+
One	10%	13%	18%	10%	8%	2%
Two	15	23	15	29	4	4
Three or more	27	53	47	21	17	2
None	44	11	17	33	61	92
Don't know/no answer	4	--	3	7	10	--

Source: The Gallup Organization
Apparel Merchandising, March 1986

Blouses

Still another survey by The Gallup Organization, published in the January 1986 issue of *Apparel Merchandising*, indicates that department stores were the principal store type shopped by blouse purchasers.

CONSUMER BUYING HABITS

Blouses (continued)

Stores Types Usually Shopped For Women's Blouses

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Department stores	47%	48%	56%	45%	41%	42%	40%	51%	60%
Discount stores	22	21	21	23	24	23	30	21	11
Specialty stores									
Mass merchandisers	21	27	19	23	21	13	16	20	24
(Sears, Penney, Ward)	20	13	22	11	29	26	29	21	12
All other stores	7	4	7	13	7	2	4	6	15
Don't know/no answer	4	2	—	4	3	11	1	3	3

Price Usually Paid for Women's Blouses

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Less than $15	28%	28%	31%	24%	29%	30%	45%	27%	11%
$15 - $24.99	40	44	41	35	43	35	37	49	36
$25 - $29.99	10	12	7	16	8	8	4	9	18
$30 or more	16	11	17	19	18	11	11	12	29
Don't know/no answer	7	5	4	7	4	18	5	4	6

Style of Blouses Expected to Buy in the Next Year

		Age Groups					Income (thous. $)		
	Total	18-24	25-34	35-49	50-64	65+	Under $15	$15-$30	$30+
Tailored shirt	34%	35%	44%	35%	35%	17%	37%	38%	40%
Tailored blouse	29	23	26	37	33	24	31	28	35
Soft blouse	28	24	37	31	31	14	20	32	42
Dressy blouse	25	30	32	23	25	13	18	30	28
Big shirt	29	54	37	31	16	6	23	29	36
None	13	6	5	8	12	40	20	8	5
Don't know/no answer									

Source: The Gallup Organization
Apparel Merchandising, January 1986

SCHEDULE OF ADDITIONAL FACT FILES

COATS, SUITS, RAINWEAR, AND FURS (WOMEN'S, MISSES' AND JUNIORS'): Details number of manufacturers by employment size, cuttings, and value of shipments. Also covered at the industry level are price trends and imports/exports. At the retailer level, data is presented on estimates of retail volume, sales share by outlet, merchandising and operating results, and also focuses on consumer buying habits and plans.

CONSUMER MARKET DEVELOPMENTS: Provides a detailed view of consumers in the U.S., including population by age and income, number of households and living arrangements, school enrollment, educational attainment, the labor force, employment and earnings. Also covers trends in consumer prices, in personal consumption expenditures by product classification, and the outlook for consumer markets based on current economic trends.

DEPARTMENT STORE SALES (Including Selected Major Apparel Specialty Store Sales): Covers sales and the number of stores operated, listed by geographic region and state based on buying headquarter locations. Lists branch store sales where available, as well as plans to open new stores. Sales information on major general merchandise/apparel retail chains, which are listed alphabetically, and a list of department stores with sales of $50 million or more, are included. (1985 Edition available now -- 1986 Edition available in November)

DRESSES & RELATED APPAREL (WOMEN'S, MISSES' AND JUNIORS'): Statistics on the dress and related women's apparel industry, including trends in the number of manufacturers and in production and shipments. Also data on retail sales by outlet type and on consumer buying habits.

FASHION ACCESSORIES (MEN'S AND WOMEN'S): Information on a wide range of fashion accessories including jewelry, watches, gloves, belts, handbags, small leather goods, luggage, neckwear, hats. Includes key information at manufacturer level, as well as sales and consumer data.

FOOTWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A statistical summary of the U.S. footwear industry and footwear markets. Covers domestic production, shipments, and imports. Provides retail sales and merchandising statistics, including sales share by outlet type.

HOME TEXTILES: Information on the industry includes the latest data on number of manufacturers, production and shipments for a wide range of products, including bed linens, towels, blankets and comforters, slip covers, pillows, curtains and draperies. Trends in merchandising, departmental operations and sales by outlet type.

HOSIERY/LEGWEAR (MEN'S, WOMEN'S AND CHILDREN'S): A comprehensive report on these industries at the mill, retailer and consumer levels. Included are details on production and shipments, retail sales by type of outlet and on patterns in consumer spending.

HOUSEHOLD FURNITURE AND BEDDING: Contains U.S. industry-wide data on quantity and value of manufacturers' shipments of furniture and bedding (mattresses and dual-purpose sleep furniture). Retail information includes sales by store type, consumers' furniture style preference, etc.

INFANTS', TODDLERS', GIRLS' AND BOYS' WEAR: Manufacturer data spotlights production, value of shipments, number of manufacturers, employment in the industry by company size, price trends. At the retailer level, data focuses on sales share by type of outlet and on operating ratios in department and specialty stores.

INNER FASHIONS: NIGHTWEAR, DAYWEAR AND LOUNGEWEAR (WOMEN'S, MISSES' & JUNIORS'): Data on production and shipments, tracing market shifts in response to fashion changes, retail trends, sales by outlet type, and merchandising ratios.

MAJOR APPLIANCES AND ELECTRIC HOUSEWARES: Covers a wide range of products in the major appliance and traffic appliance classifications, including equipment, and personal care appliances. Details production and shipments, sales trends, sales by outlet type and retail merchandising results.

MEN'S FURNISHINGS AND WORK WEAR: Includes information on number of manufacturers, production and shipment figures on shirts, underwear, nightwear, neckwear, hats, etc., size of firms, imports and exports. Also provides data at the retail level, including sales and merchandising trends, operating ratios, and sales share by type of outlet.

MEN'S SPORTSWEAR, CASUAL WEAR AND JEANS: The wide variety of men's wear items included in this broad category are covered from available information on the industry at the manufacturer, retailer and consumer level. Included is information on production and shipments, market trends, retail sales by outlet type and consumer buying practices.

MEN'S TAILORED CLOTHING/SEPARATES AND RAINWEAR: Manufacturer level profiled by production value of shipments, employment, size of firms. Data is presented on retail sales, sales share by outlet type and operating ratios. Also data on consumer buying habits.

RETAILING/MERCHANDISING TRENDS: Covers the dramatic changes underway in the operations, of the large retailing organizations, such as the decentralization of operations beyond traditional geographic boundaries and diversification of operations to include store types differing from the primary business. Also covered are developments in brand name merchandising, store labels, designer labels, licensing and off-price retailing.

SALES OF MAJOR CLASSIFICATIONS OF CONSUMER GOODS BY RETAIL OUTLET TYPE: Covers sales of grocery products, drugs, apparel, footwear, sporting goods, home furnishings and other product lines by major type of retail outlet. The sales are detailed, and trends analyzed on market shares held by major outlet types based on the latest complete Census of Retail Trade recently issued by the U.S. Census Bureau.

THE SPORTS/FITNESS/LEISURE MARKETS: Covers developments in the rapidly changing markets for sports and physical-fitness-related merchandise. Contains statistical data on sports equipment, apparel and footwear as well as information on the number of participants in various sports. Also includes findings in a survey on specialized sporting goods retailer operations.

SPORTSWEAR, CASUAL WEAR, SEPARATES AND JEANS (WOMEN'S, MISSES' AND JUNIORS'): A statistical view of this segment of the women's wear industry is provided, including data on production and value of shipments, imports of major categories, sales by type of outlet, price points, seasonal patterns, and consumer buying habits.

A STATISTICAL ANALYSIS OF RETAILING: A detailed statistical summary of retail trade in the U.S. based on findings in the 1982 Census of Retail Trade issued in 1985 by the U.S. Census Bureau. Includes information on the number of outlets by store type, sales, market shares by type of major merchandise classification, sales concentration by size of retail organization, geographical changes, etc. Comparisons (where valid) are made with findings in the last previous census, covering operations in 1977.

THE TEXTILE/APPAREL INDUSTRIES: Industry overview, providing statistics on fibers and fabrics as well as finished goods. Includes information on industry size, concentration of sales by mill/manufacturer size, production and shipments by U.S. mills, as well as exports and imports for end-use markets. Covers capital expenditures and data on mill machinery.

TOILETRIES, COSMETICS, FRAGRANCES AND BEAUTY AIDS: A detailed view of the U.S. industry covering products for both the female and male markets. Includes latest available industry-wide statistics and projections, as well as data on leading manufacturers in various product categories. Consumer expenditures, buying habits and usage of various product types are highlighted, as well as data on sales by outlet type and advertising expenditures by major producers.

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